Knowvation™

Quick Start Guide for the new Survey Records System

Public User Edition

Contents

1 Introduction

This document is targeted to help public (kiosk and non-kiosk) users navigate the new Survey Record System (SRS). This guide provides information, tips and help for finding and purchasing documents stored in SRS.

SRS provides online access to thousands of maps, plans, and a variety of records related to land information. Records can be searched using a standard web browser in a number of ways, including by parcel, by address, by document type and by geospatial area on the map. While SRS provides support for major browsers such as Google Chrome, Microsoft Internet Explorer, Microsoft Edge, and Mozilla Firefox, it is recommended that Google Chrome be used, as it allows for the most optimized user experience.

2 Login and Home Screen

Go to https://srs.sandiegocounty.gov

Upon clicking on "Log In", you are presented with a login dialog. Users can provide a username and password combination to sign in. Systems that allow for ADFS logins will display a red ADFS sign-in button (or dropdown if multiple ADFS connections are supported). Figure 1 displays the login form. Login in with your account information if you are already registered, otherwise you can create an account and register. Should you forget account information, you may hit the "I forgot my username" link to send an email with your username, to the account email. "I forgot my password" sends an email with a link to a password reset page.
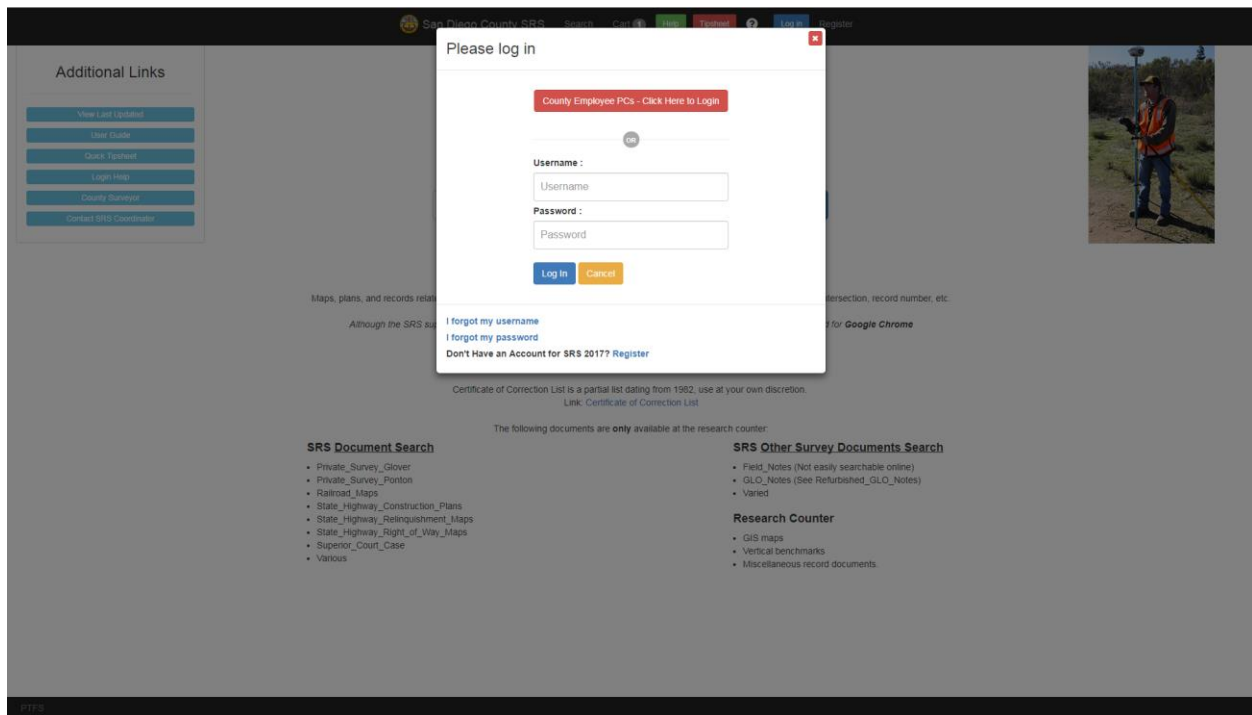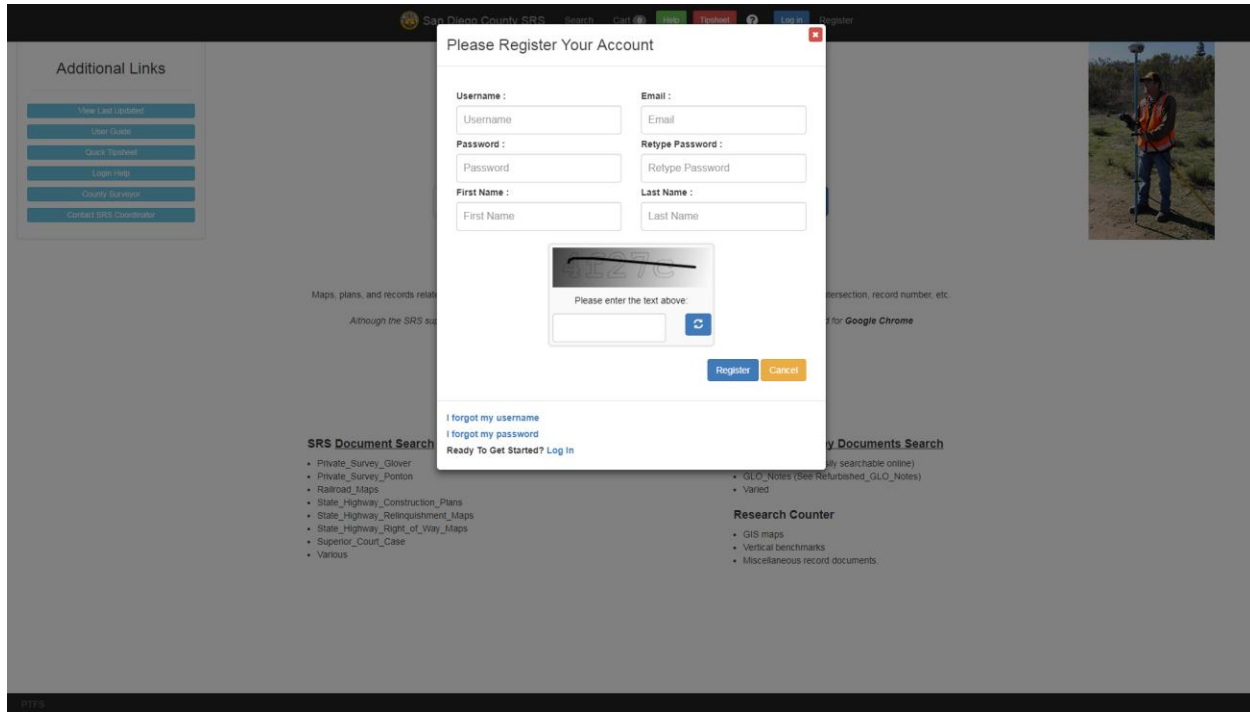

Figure 1: The login screen where users can log in, either through a username and password combination or an ADFS login.

2.1 Register a new account

By hitting the "Register" link seen in Figure 1, a registration form is displayed. Account registration requires a unique email and username that's not already in use, a password, contact information, and a CAPTCHA. Once filled out, hit the register button to create the account. Although an account is not required to perform purchases, having an account allows users to maintain a purchase history where users can re-download old orders and export receipts. See Figure 51 for more information on the purchase history. Registered users will also receive emails about updates or SRS outages from the SRS Coordinator.

Figure 2: The registration form for a new account. Account registration requires a unique email and username that's not already in use, a password, contact information, and a CAPTCHA. Once filled out, hit the register button to create the account.

Whether logged in or using SRS as an anonymous public user, the home screen provides an "I want to" selector for quick searches, a search box, and a section of additional links. In the "Additional Links" section there is a link for a custom query to view the last uploaded documents within 6 weeks. There is also a link to view the help documentation, which is always available through the green "Help" button in the navigation bar as well. Likewise, a quick tipsheet can be accessed via the "Quick Tipsheet" link or the red "Tipsheet" button in the navigation bar. Finally, there is a link to send an email to the SRS Coordinator.
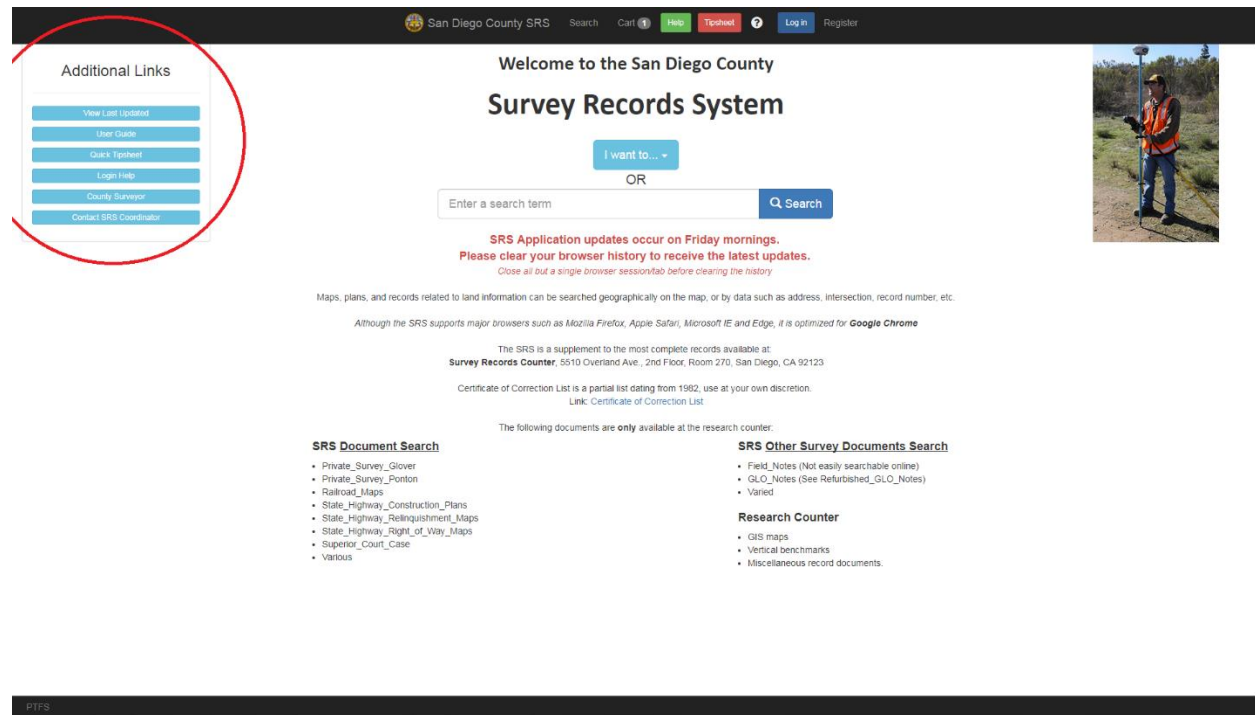

Figure 3: The initial home screen. Highlighted in the screenshot is the "Additional Links" section which provides links to the help and tipsheet documents, a custom query to view last uploaded documents within 6 weeks, and the email for the SRS Coordinator.

3 Search

SRS provides quick access to the most popular search capabilities from the SRS Home Page. Use the "I want to" selector to choose your preferred search method.
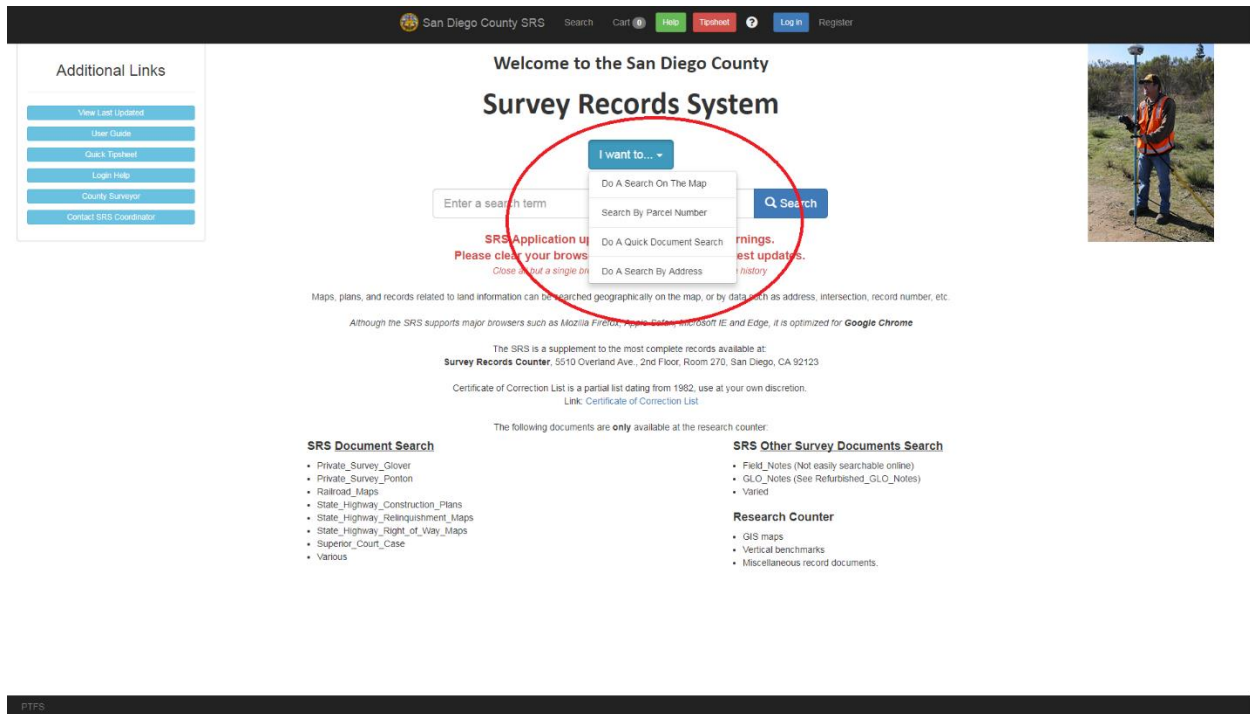

Figure 4: The "I want to" selector on the Home page. Choose an option to begin a quick search.

3.1 Search By Document Type (Quick Document Search)

From the Home page, select "Do a Quick Document Search" from the "I want to" selector or enter a query string into the search box. Using the search box performs a specific query while the "Do a Quick Document Search" retrieves all documents (a wildcard search).
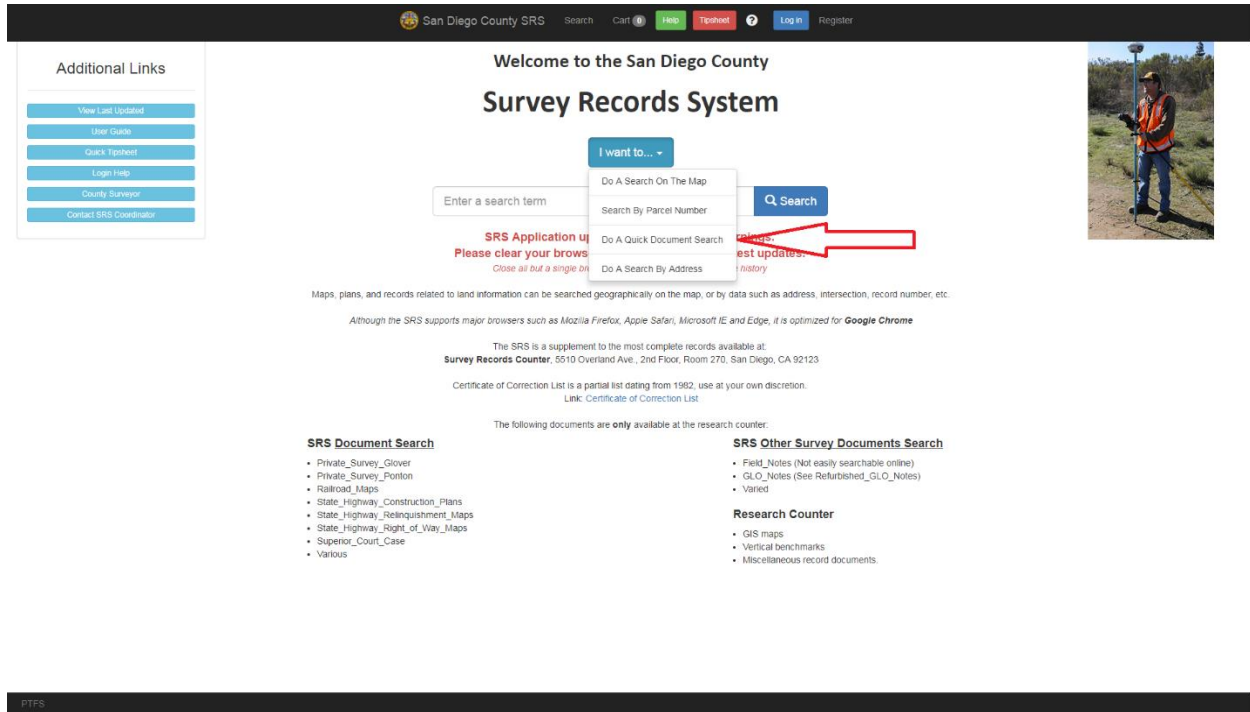

Figure 5: Select the "Do A Quick Document Search" to perform a quick wildcard search and retrieve all documents.

Figure 6: The results of a wildcard search, as seen in the Grid View. To the left of the grid is the list of document type facets, which upon clicking, will filter the results.

There are various methods of narrowing down the document search results. The first is to use the document type facets. The facet will apply the selected document type and filter the results to that type. Any filters/facets chosen can be removed by clicking the filter's "X" button in the panel above the map.

Figure 7: Applying any filter or facet will create a closeable badge above the results view. Close any badge to remove the filter.

For the more adventurous user, SRS provides additional filters to help limit the result set. Users have the option of searching by Category (Document, Survey Document, and Archived Documents). Each category provides its own custom search form, which could include fields such as Document Type, Document Number and more. Users can select multiple document types from the Document Type dropdown list. Doing so will remove any custom search forms.

Figure 8: Select multiple document types from the dropdown to get a larger result set.

Figure 9 shows an example of performing a wildcard query search for Archived Documents. Simply, open the "Search Category" dropdown list and select "Archived Documents Search". Then hit "Update Search Criteria" to update the current search. If no terms are provided in the search box, hitting "Update Search Criteria" will automatically perform the "*" search.

Figure 9: Applying the "Archived Documents Search" Search Category filter narrows down the wildcard search greatly.

3.2   Search By Address

This feature can be accessed in two ways:

From the home page, click the "I want to" selector and choose "Do A Search By Address". Doing so will open the "Search" tab and automatically set up the "Locate By" form specifically for address searching. Figures 10 and 11 display this process.
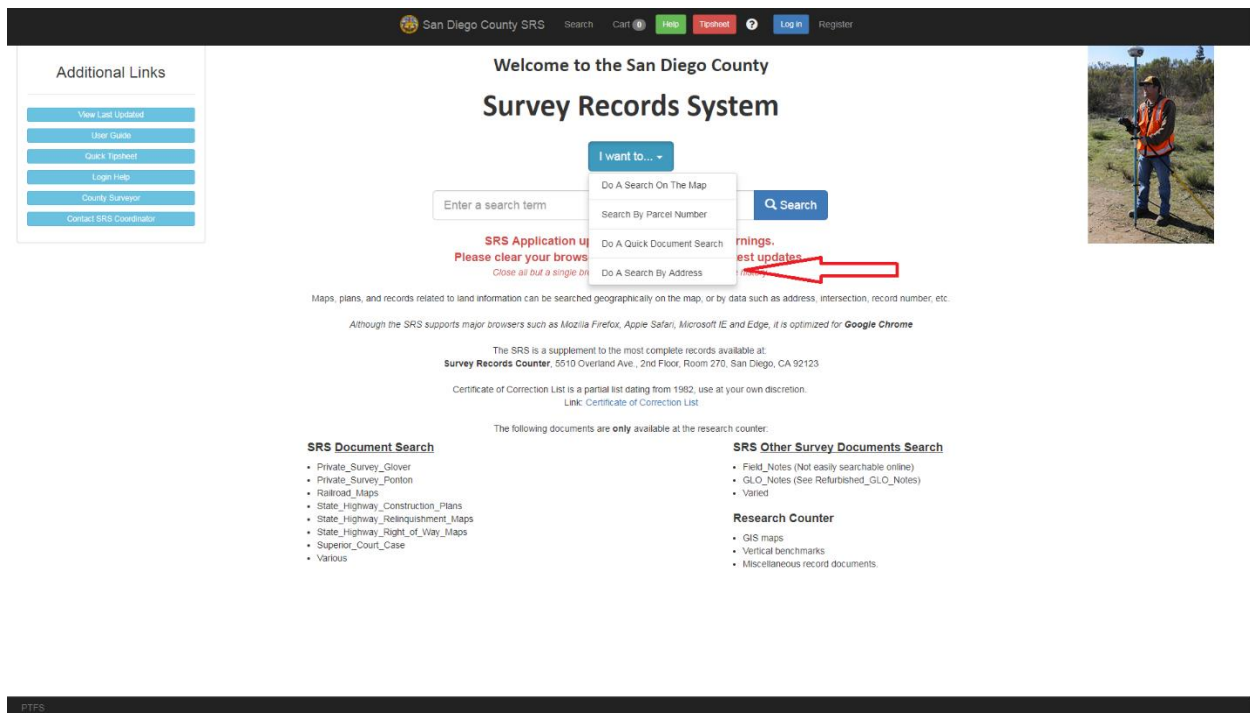
Figure 10: Selecting "Do A Search By Address" will open the map view and automatically display the necessary form for searching by address. Figure 10 demonstrates the result of selecting "Do A Search By Address".

Alternatively, if you are already in the "Search" tab, you can click on "Area of Interest" at any time and select "Address" from the "Locate By" selector.
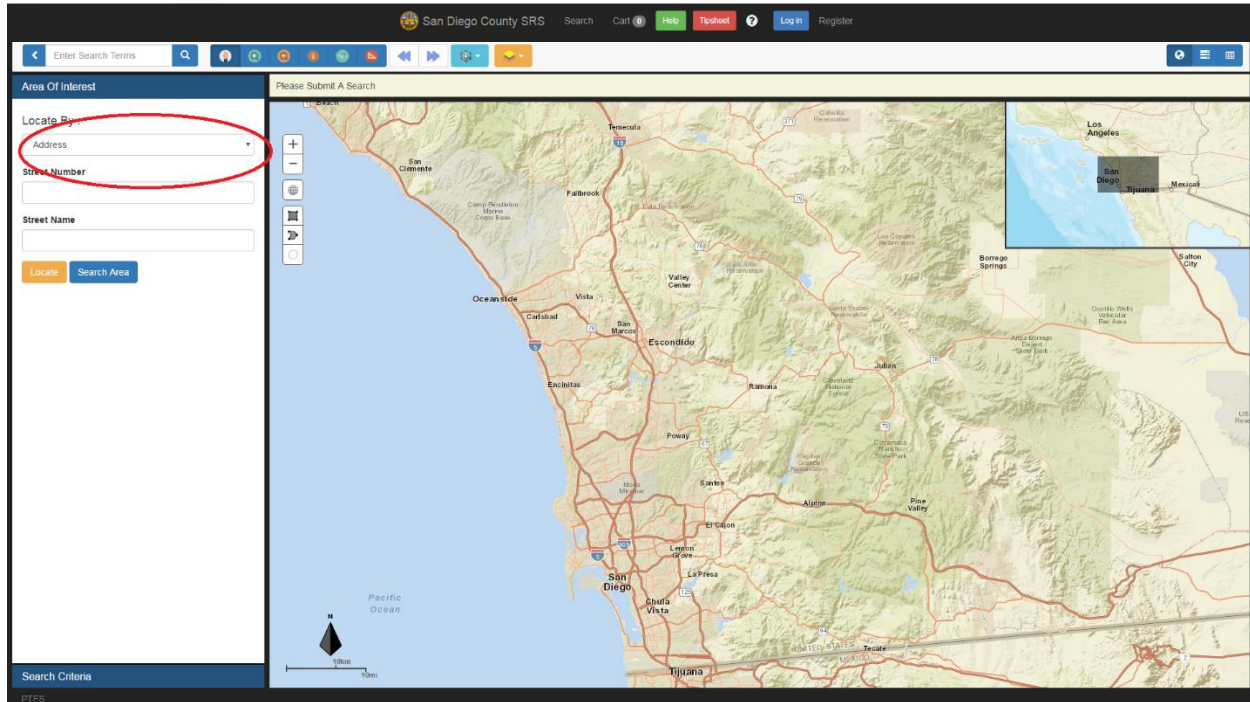
Figure 11: Selecting "Address" from the "Locate By" selector generates the necessary form for locating and searching and address.

Once the form is present, simply provide a street number and name, then choose "Locate" if you want the map to zoom to the address, or "Search" to perform an Area of Interest (AOI) search. Figure 12 shows the result of performing the "Search Area" action on the address "5500 Campanile Dr".
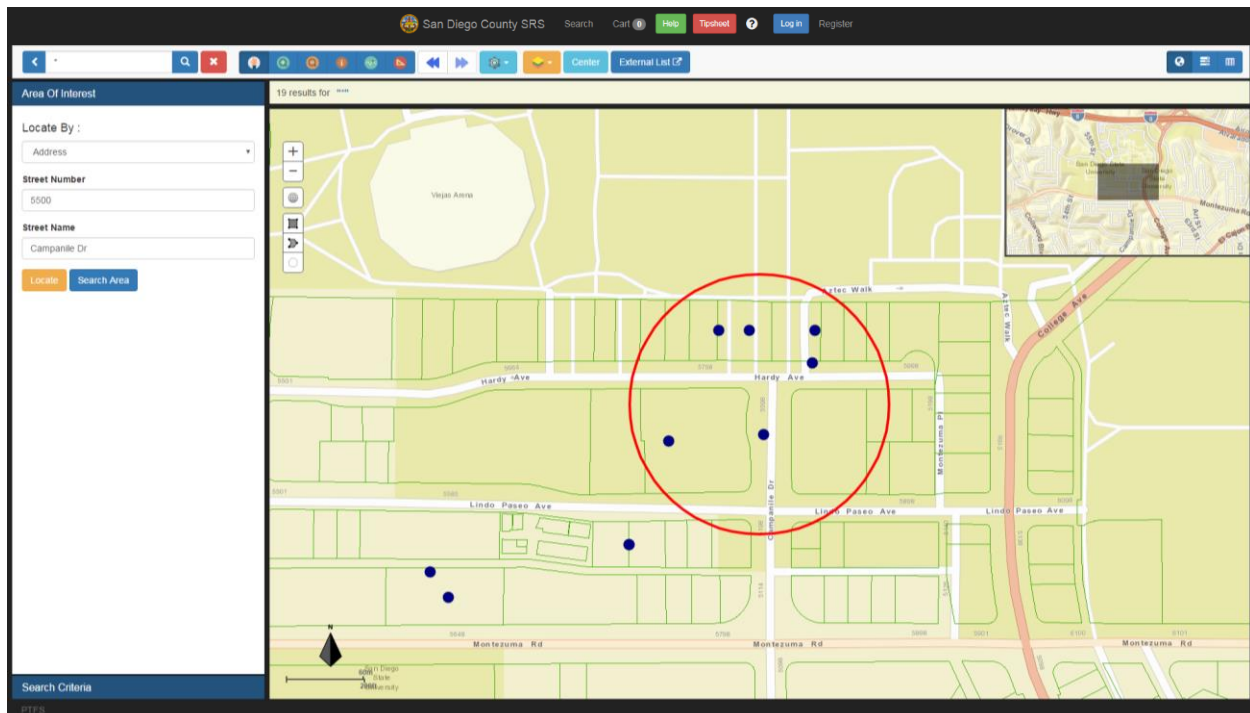
Figure 12: Searching the area for street number 5500 and street name "Campanile Dr" returned the following results.

3.3 By Parcel Number

Searching and locating parcels can be achieved through two methods:

In the home page, open "I want to" and click "Search By Parcel Number". Doing so will open the "Search" tab and automatically select "Assessor's Parcel Number" from the "Locate By" selector. This brings up the form for searching for parcels. See Figures 13 and 14 to view the process of how this works.
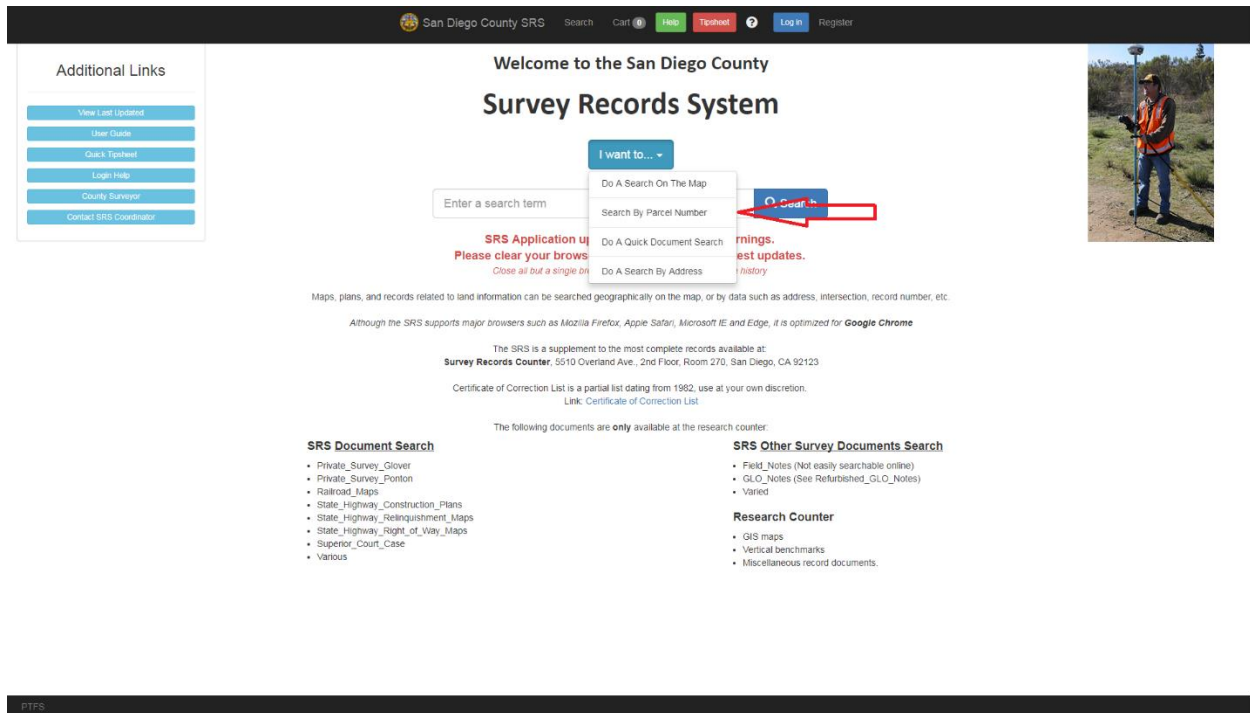
Figure 13: Selecting "Search By Parcel Number" will switch to the "Search" tab and automatically display the form for searching parcels

Alternatively, if you are already in the "Search" tab, click on "Area of Interest" then choose "Assessor's Parcel Number" from the "Locate By" selector.
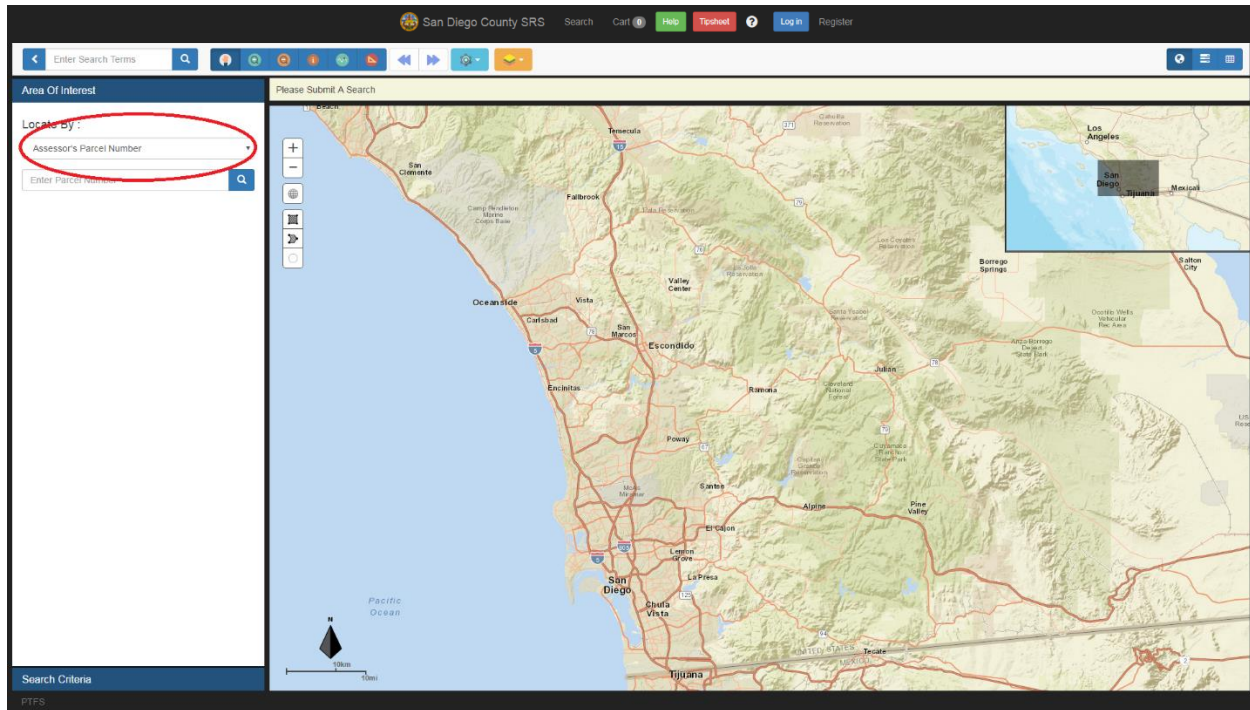
Figure 14: Selecting "Assessor's Parcel Number" from the "Locate By" selector generates the necessary form to begin searching.

Enter a parcel number to begin searching for parcels. Providing a partial parcel number will use the auto complete feature and return results matching the number prefix. Results are limited to 5 at a time; enter more characters to narrow down the search.
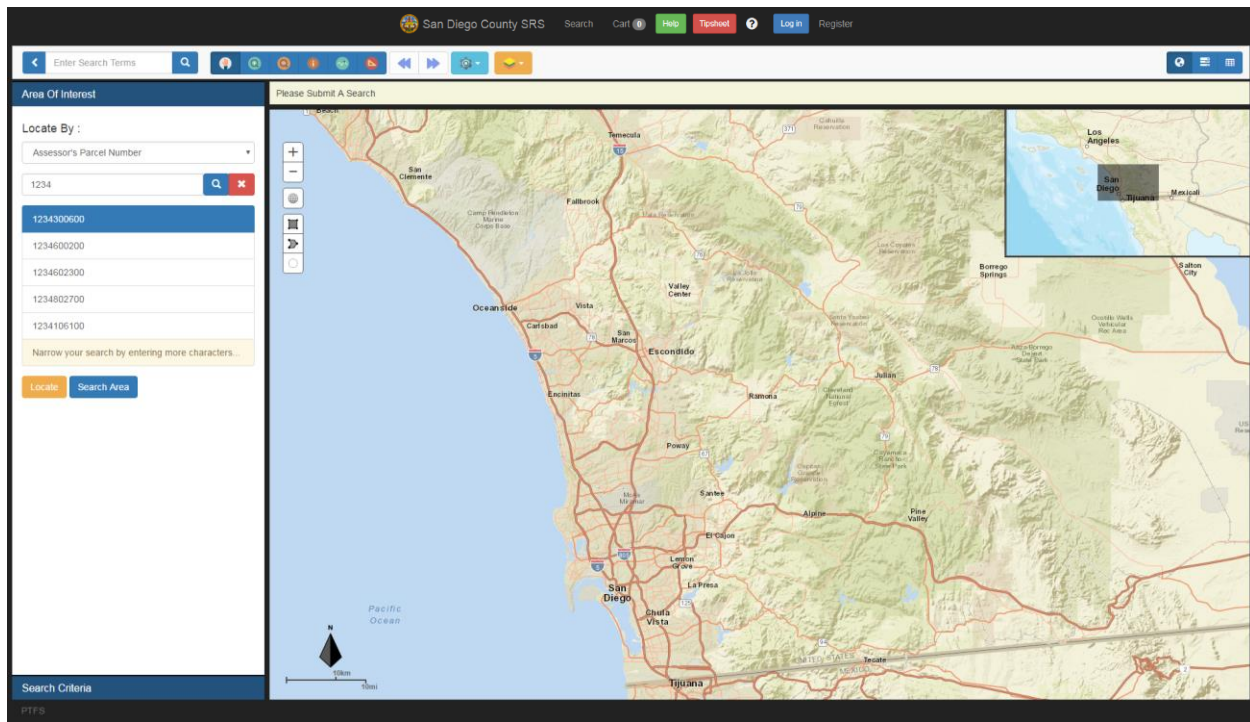
Figure 15: Providing only a portion of the parcel number yields many results. Each of the results matches the prefix for 1234.

To perform an action with desired parcel, click on the result and you will then be able to locate or search that parcel. The "Locate" button flashes a green outline for a few seconds on the map while "Search Area" performs an AOI search on the parcel's extent. Figure 16 provides an example of performing the "Locate" action on the parcel number 1234203400.
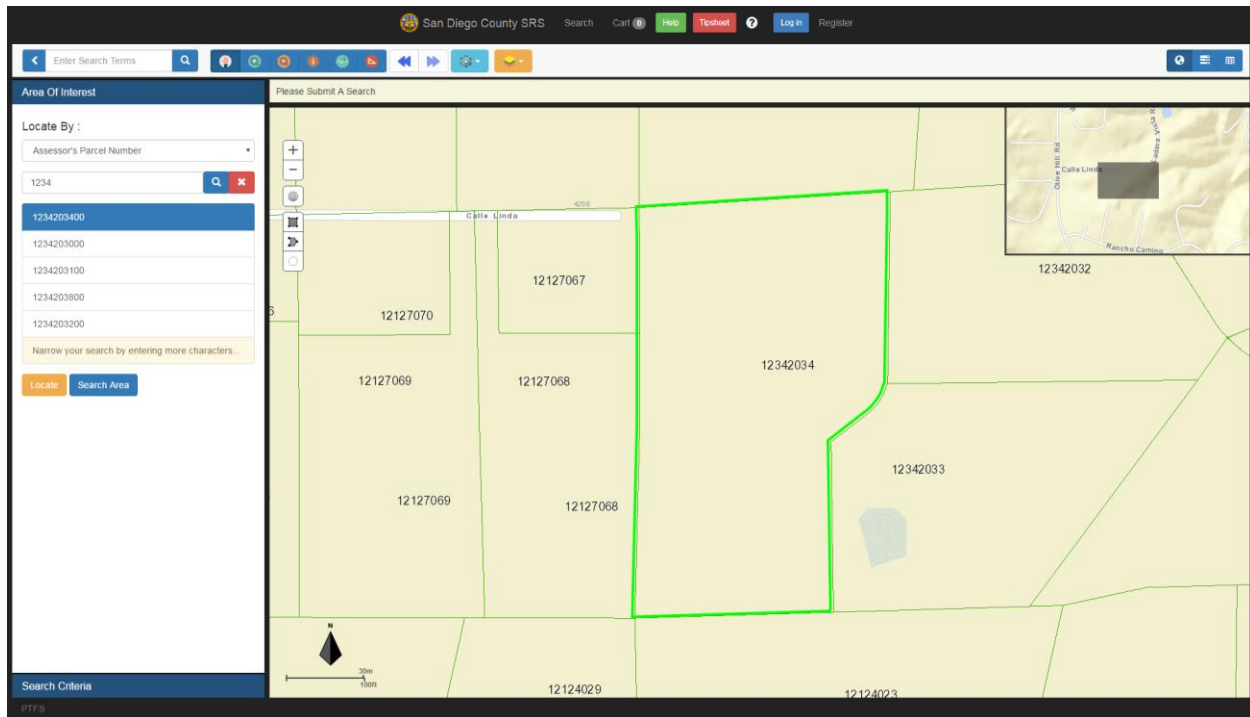
Figure 16: To locate or search on a parcel number, a result must first be selected. In this figure, locate is performed on the parcel 1234203400, which zooms and highlights the feature on the map for a few seconds.

3.4 Search By Geospatial Area (Search On The Map)

3.4.1 Searching by polygon or circle (Area of Interest, AOI)

On the left hand side of the map is the AOI tool which provides users with the capability to perform an Area of Interest search. Users can create square, circle and polygon shapes to initiate a search (Figures 17 & 18 below).
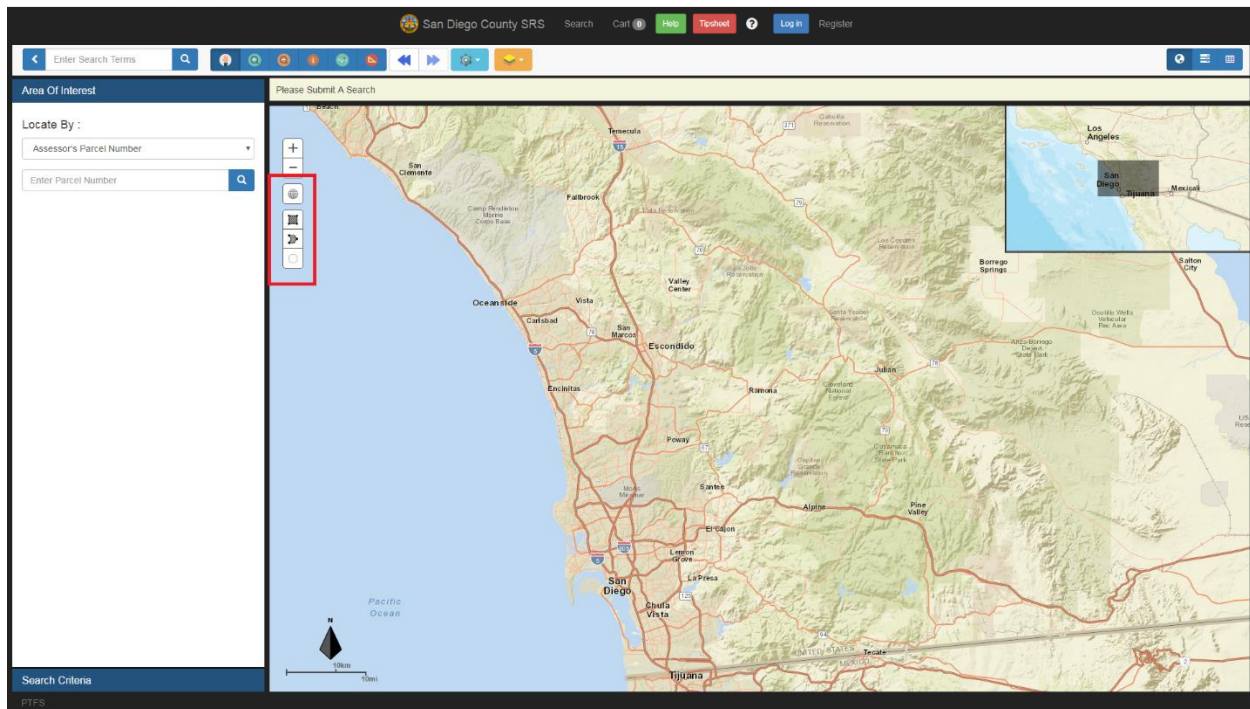
Figure 17: The outline indicates the Area Of Interest (AOI) tools available on the Map View.
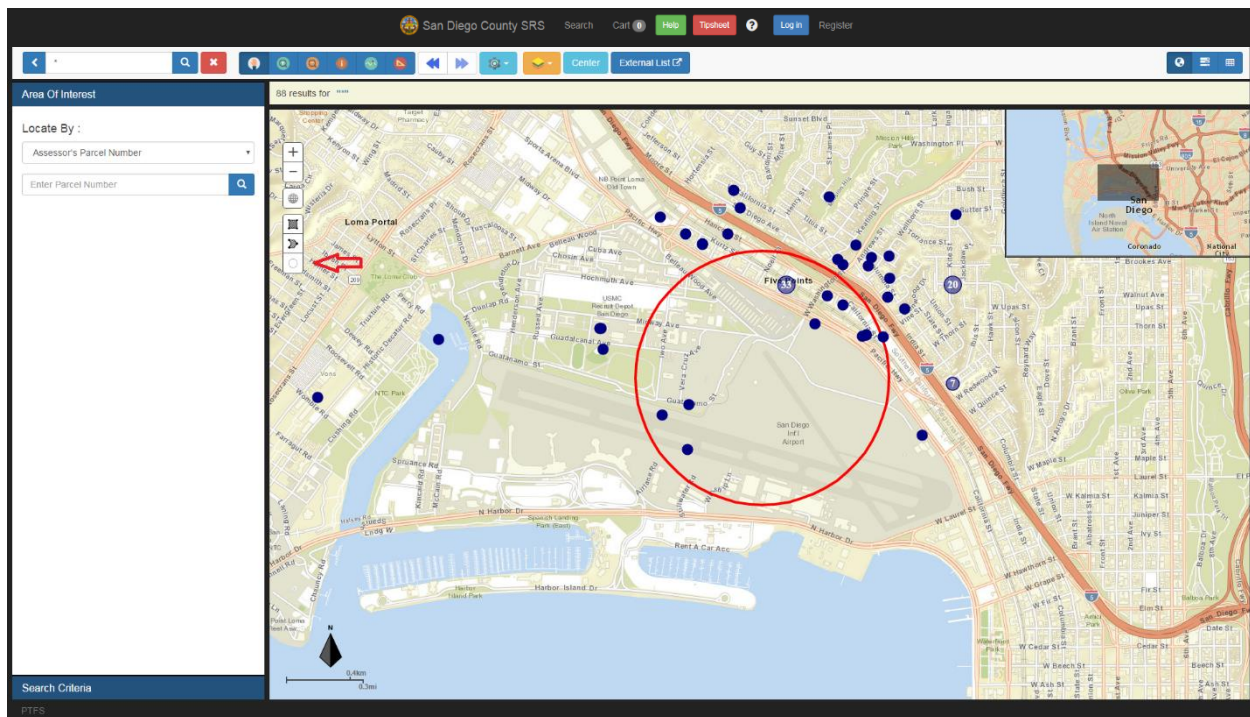
Figure 18: Selecting the Circle AOI tool will allow the user to create a circular search area on the map. This AOI search on the San Diego International Airport yields 88 results.

To use the polygon tool click on the polygon icon on the map, then left click once to start the polygon creation process. Each click creates a new polygon side, while a double click on the map closes the polygon. Creating an object will query the system for any documents within the area. After a search is performed, you can click "Center" if you would like to re-center to the AOI extent. Additionally, you can click on the globe located above the AOI tool, to zoom to a full extent.

3.4.2 Locate By

In addition to parcel number and address, the "Locate By" selector allows users to locate/search by City, Manual Entry (coordinates), Intersection and Public Land Survey. Clicking on an option generates the appropriate customized search form.
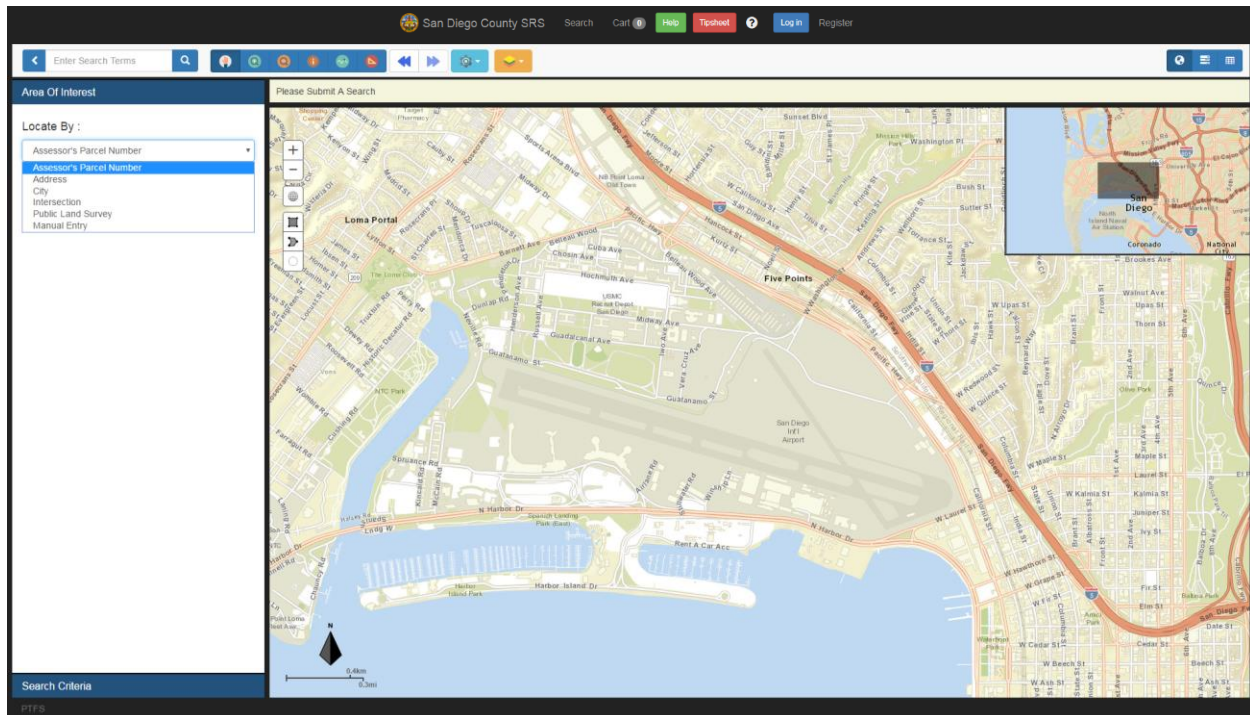
Figure 19: The options available after opening the "Locate By" selector. Choosing an option reveals the necessary form for performing locating/searching.

3.4.2.1 City

Selecting "City" from "Locate By" brings up a form with a dropdown list of all the searchable cities. In Figure 20, a locate action is performed on the city of Solana Beach.
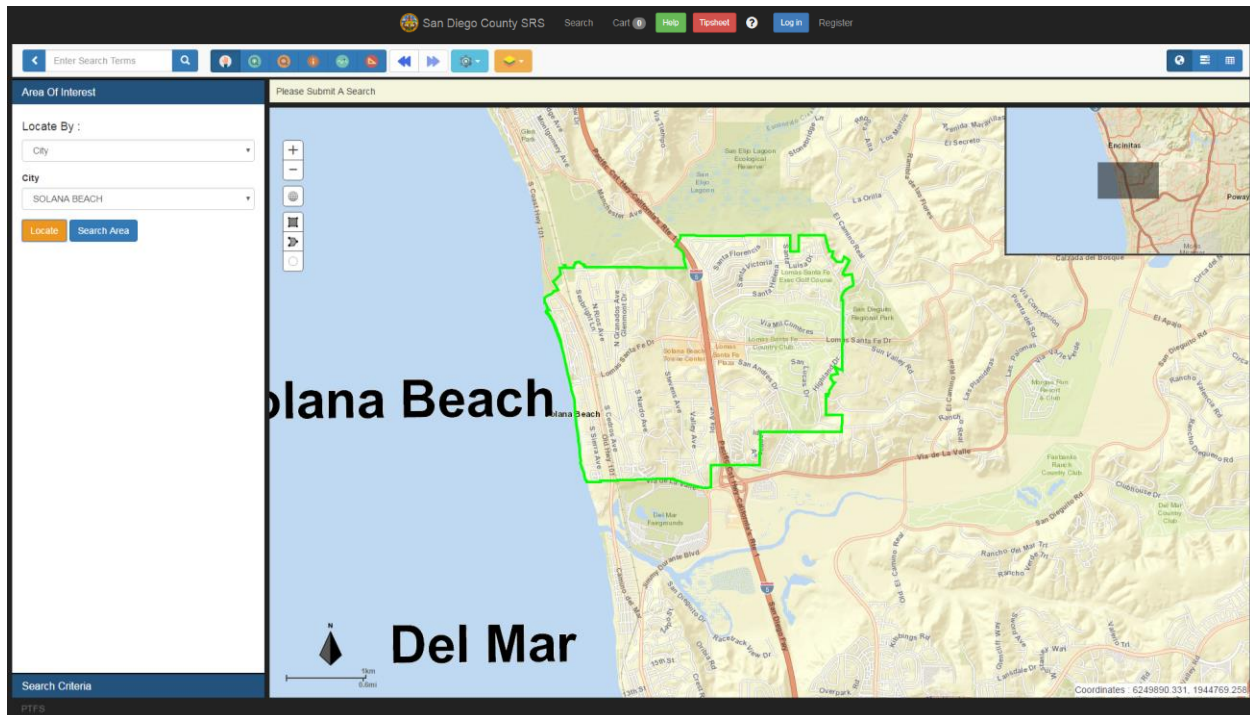
Figure 20: Performing a locate action on the city of Solana Beach.

3.4.2.2   Intersection

Selecting "Intersection" from "Locate By" brings up a form with two input fields for street addresses. Locates and Searches are performed on the intersection of the two addresses. In Figure 21, a search action is performed on the intersection of Carlsbad Village Dr and Monroe St.
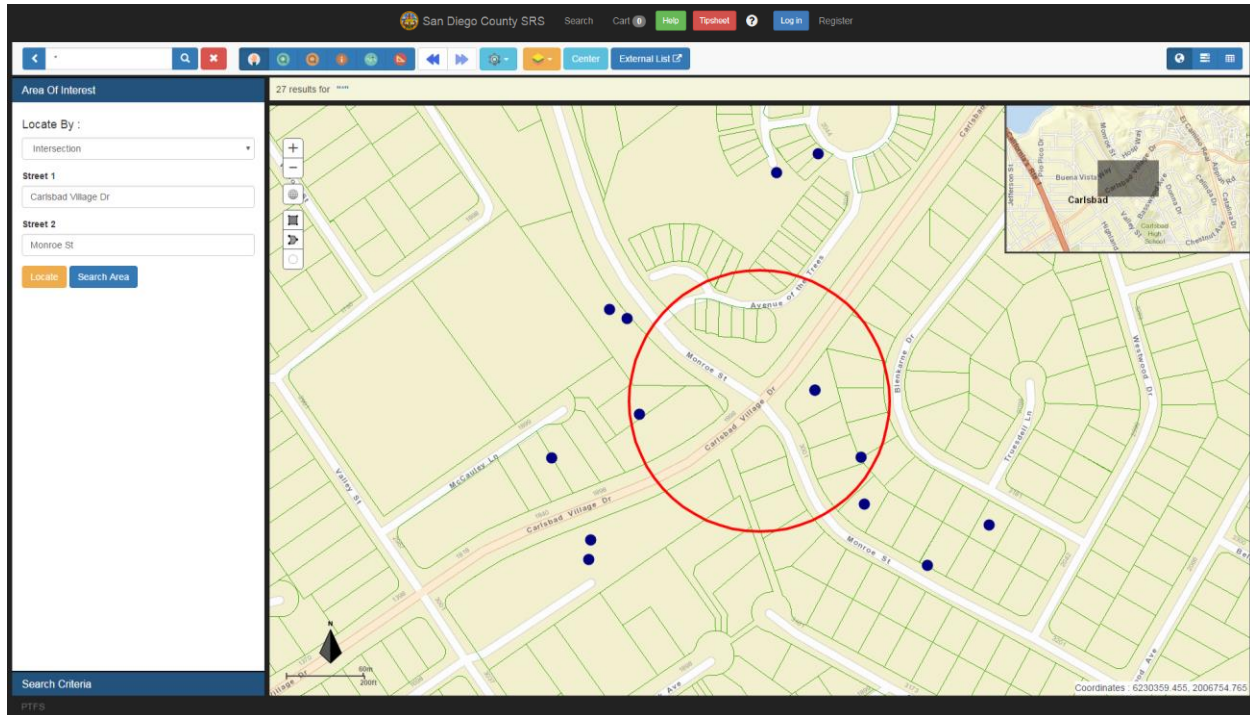
Figure 21: By selecting "Intersection" from the "Locate By" selector, we can locate and search street intersections. Here we perform a search on the intersection of Carlsbad Village Dr and Monroe St.

3.4.2.3 Public Land Survey

Selecting "Public Land Survey" from "Locate By" brings up two forms to choose from. Users can choose between Townships/Ranges and Ranchos to perform locate and search actions. In Figure 22, a locate action is performed on the Jamul Rancho.
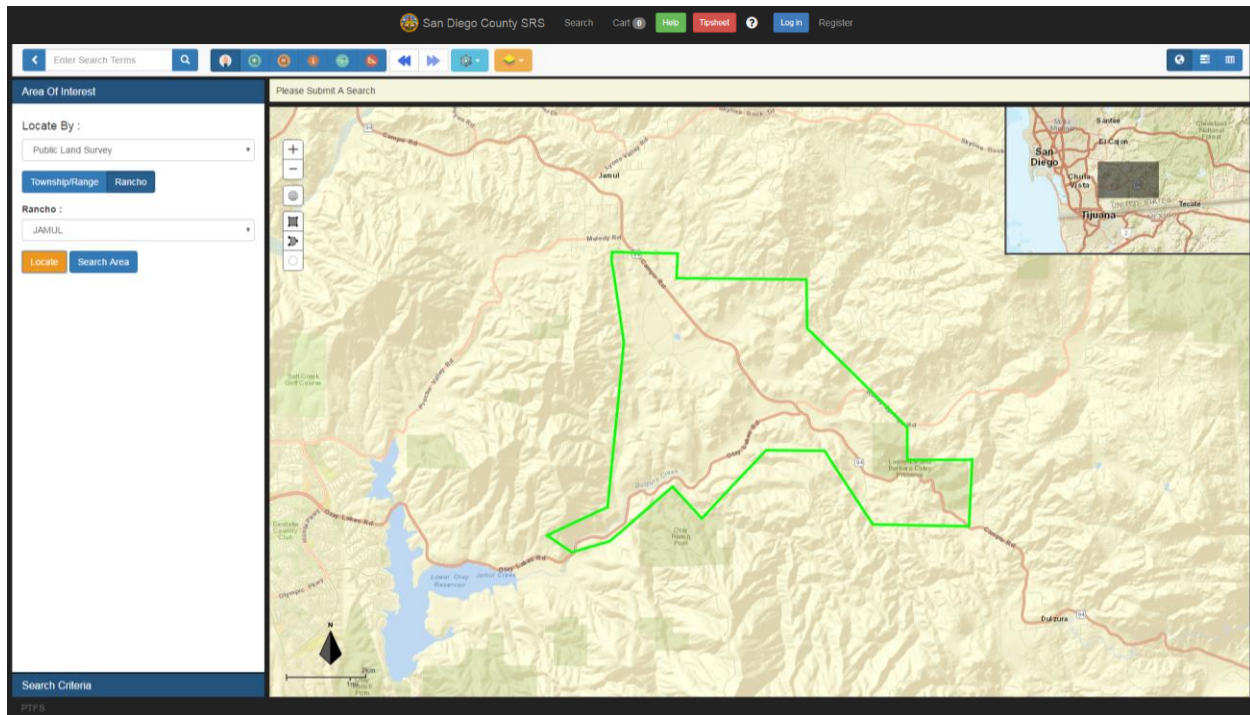
Figure 22: The Public Land Survey option allows users to perform locate and search actions with either Township/Ranges or Ranchos.

3.4.2.4 Manual Entry (Coordinate Search)

Selecting "Manual Entry" from "Locate By" brings up multiple forms which are dependent on the coordinate format chosen. Users can choose between CCS, DDD, and DMS coordinate systems. Additionally, users can users between rectangle and circle shaped to use for locate/search area. In Figure 23, the CCS format is chosen, which reveals a subform allowing users to choose between NAD83 Zone VI Feet and NAD83 Zone VI Meter for the input field format. By selecting NAD83 Zone VI Feet, a user can now provide Northing and Easting values in that projection format.
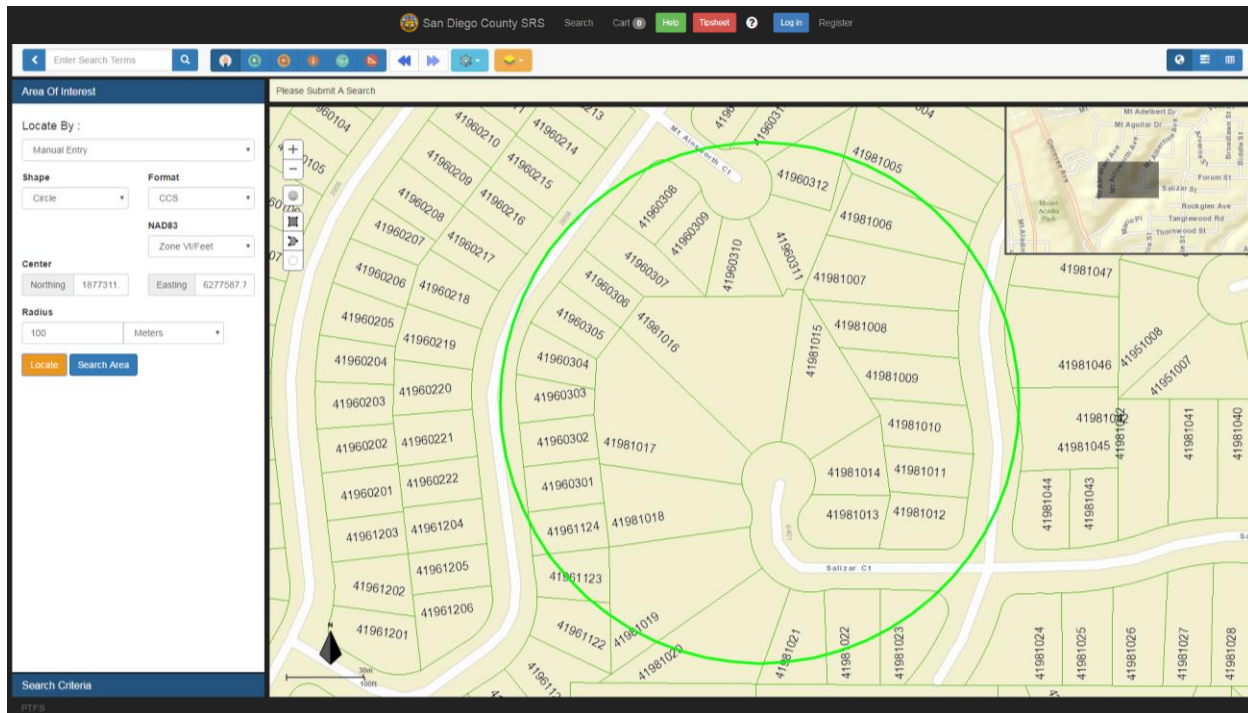
Figure 23: Manual Entry allows users to select different coordinate systems: DDD, DMS, and CCS. By selecting CCS, users can choose between NAD83 Zone VI feet and NAD83 Zone VI meters formats for the Northing and Easting input.

3.4.3   Resetting view

After performing your desired tasks, you may want to reset and clean up your view. To reset and clean search results, click on the red "X" button. Clicking the "X" button removes all search parameters, results, AOI shapes and filters. The "X" button does not reset the extent of the map. If this is desired, users can click on the "Globe" button (highlighted in Figure 24) to perform a full extent map reset.
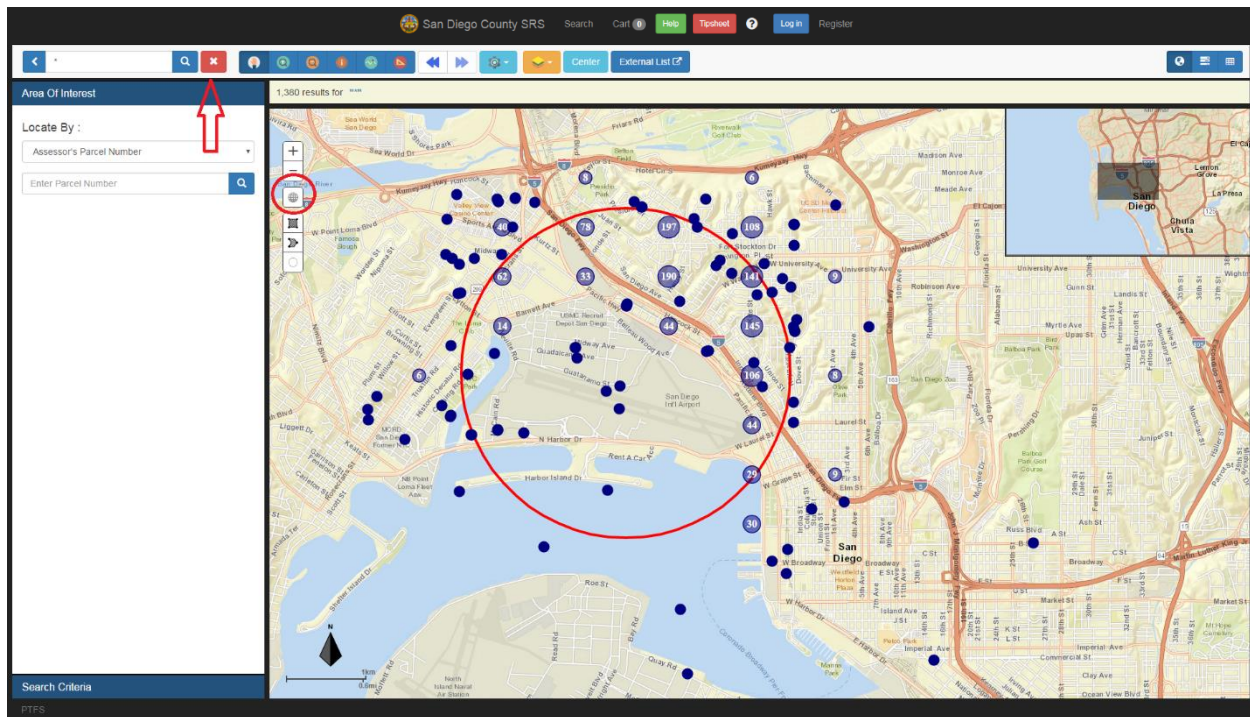
Figure 24: The arrow indicates the button for clearing and resetting the view. Additionally, if a full view of the County of San Diego is desired, clicking the circled Globe button performs a full extent map reset.

3.4.4 Other Map Features & Tools

Located above the map are additional tools to give users a more seamless experience.
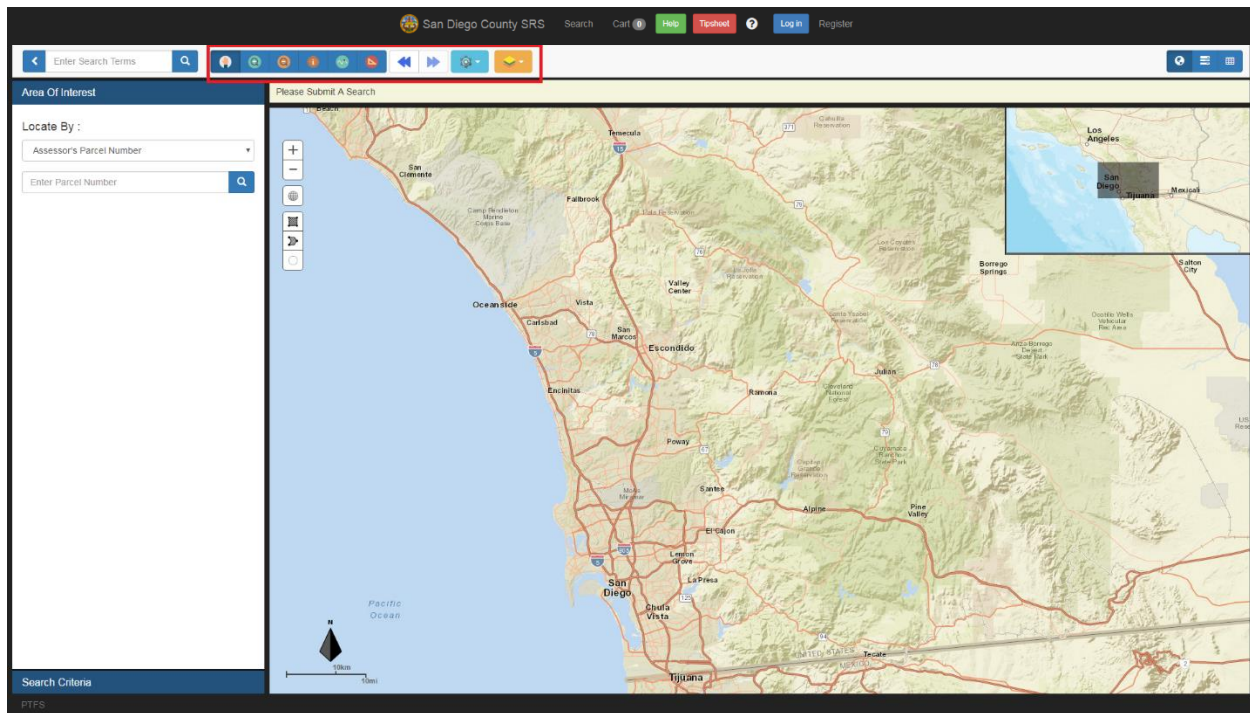
Figure 25: Highlighted are additional tools exclusive to the Map View. Some like the distance tool are simple utility functions while others like Identify are comprehensive and powerful tools.

3.4.4.1   Pan, Zoom

Use the "Pan" button to pan the map around. The "Zoom In" allows for marquee zooms (zooming to the box). Simply create the zoom and the map will zoom into the extent. The "Zoom Out" also performs marquee zooms but will zoom out. The smaller the zoom outline, the farther out it zooms.

Figure 26: The Pan and Zooming buttons. The "hand" buttons allows for panning while the "magnifying" glasses with + and – allow for zooming in and zooming out, respectively.

3.4.4.2   Identify

Use "Identify" to identify and explore map features. Then simply click anywhere on the map to search the features. Results vary depending on which map layers are enabled. The more layers there are, the more results you will receive.
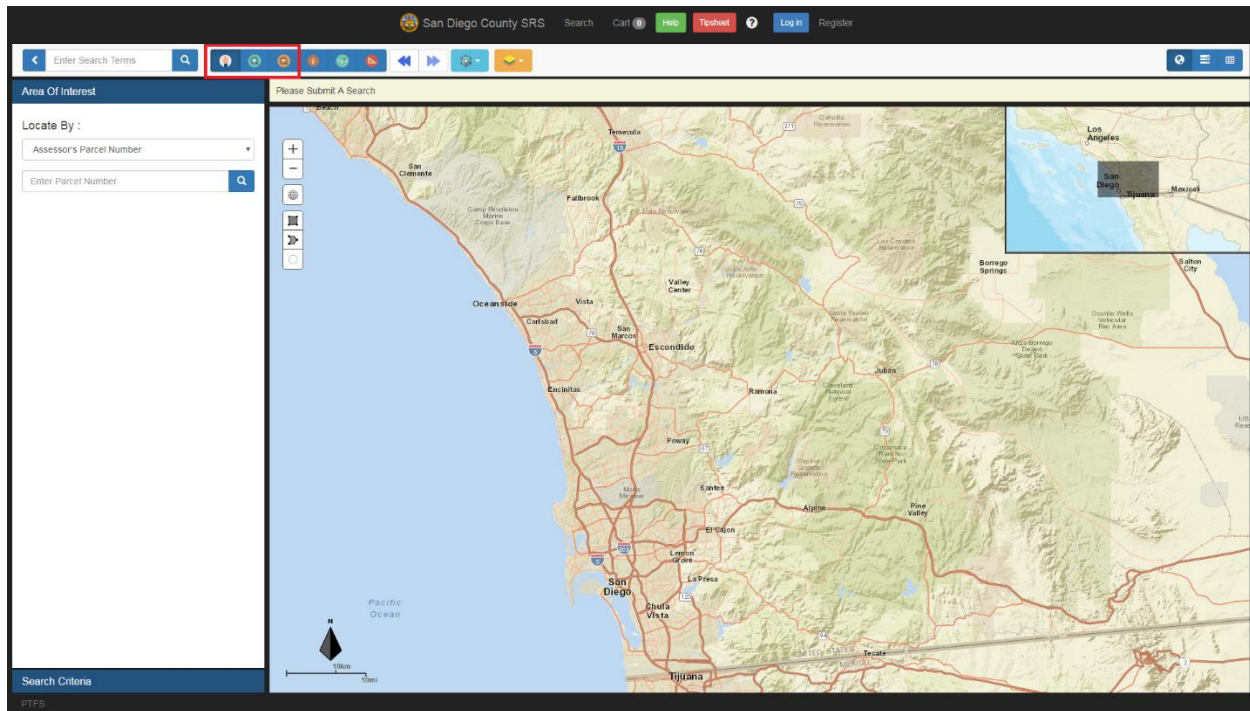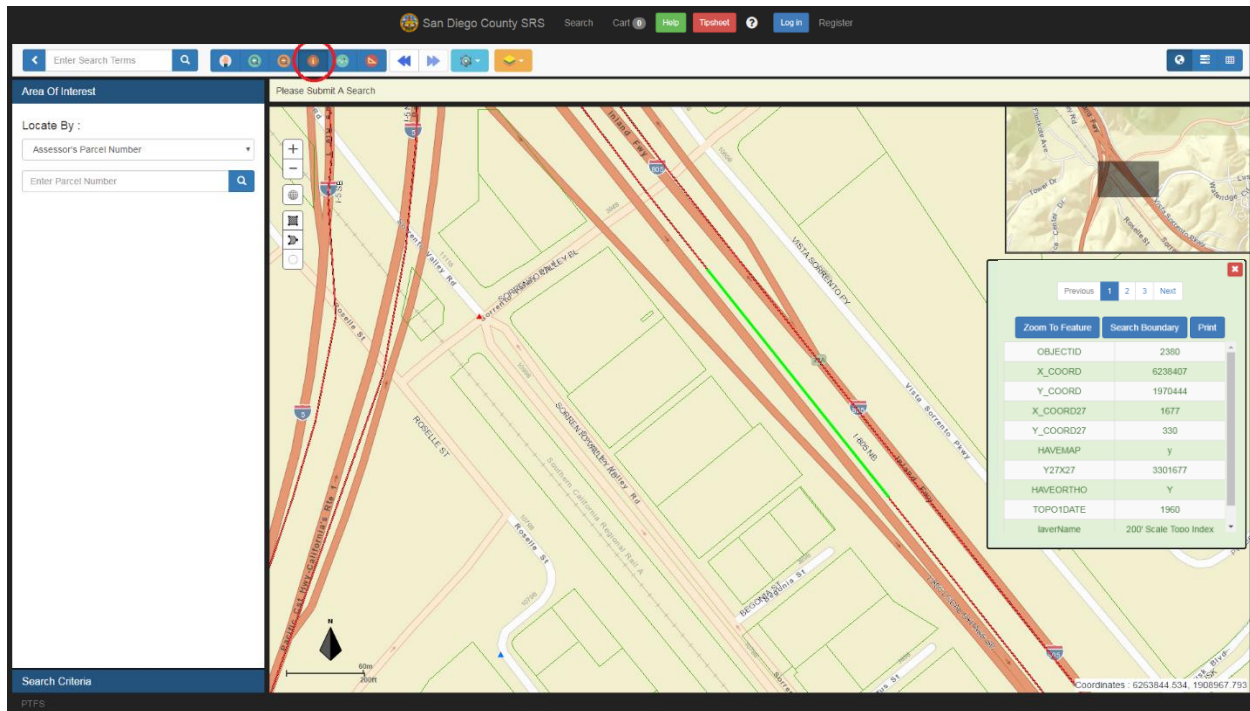

Figure 27: Clicking on this point in the map revealed 2 map features across all enabled layers. This particular feature is a section of the highway and provides metadata associated with that feature.

The pagination bar in Figure 27 indicates that there were 3 different features based on the layers enabled. The "identify" panel provides additional functionality. You can see extensive metadata for a particular feature such as layer name, shape, speed and more. Clicking "Zoom to Feature" will zoom to the extent of the feature and "Search Boundary" performs an AOI search for that feature's polygon, as seen in Figure 28. Clicking on "Print" will allow the user to print the current attribute fields and values.
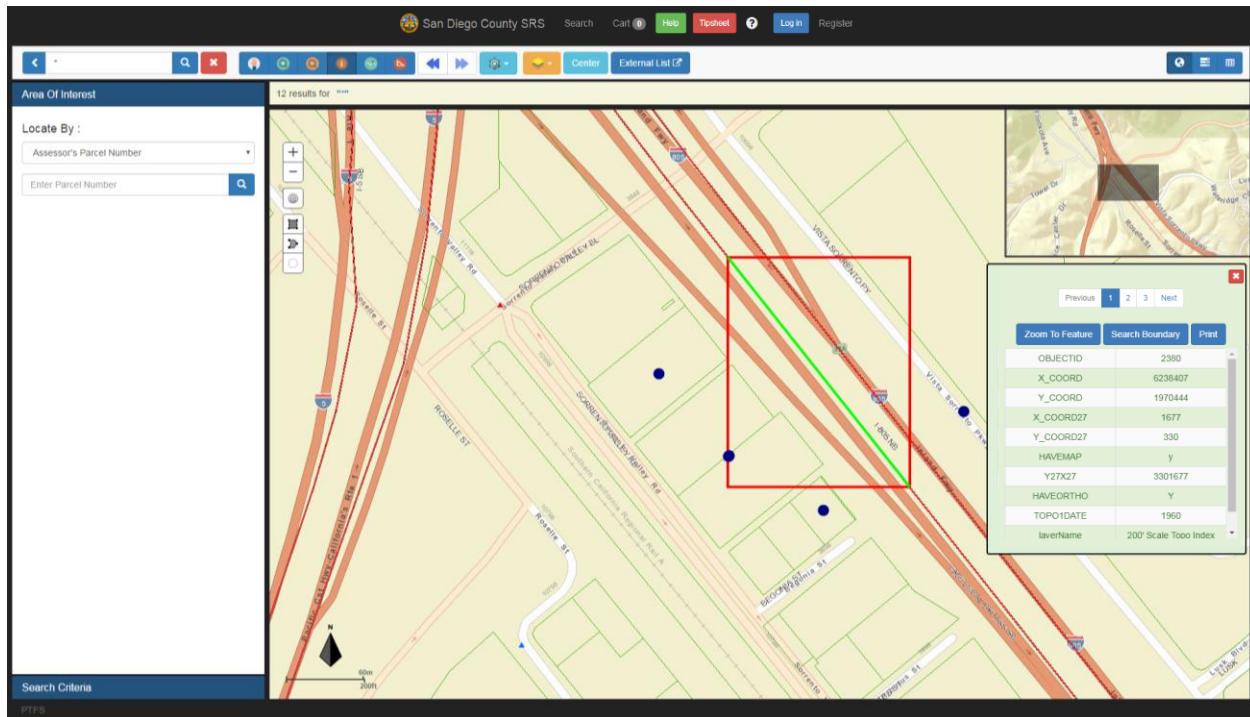
Figure 28: Clicking "Search Boundary" performs an AOI search on the selected feature, returning 12 results.

3.4.4.3 Distance, Area

Use the "Distance" button to create polyline on the map and measure the distance. Each single click creates a new direction for the polyline while a double click ends the polyline creation and performs the distance calculation. The distance returned will vary based on the Length Unit chosen in the "Settings" panel. Figure 29 provides an example of the distance tool in action.
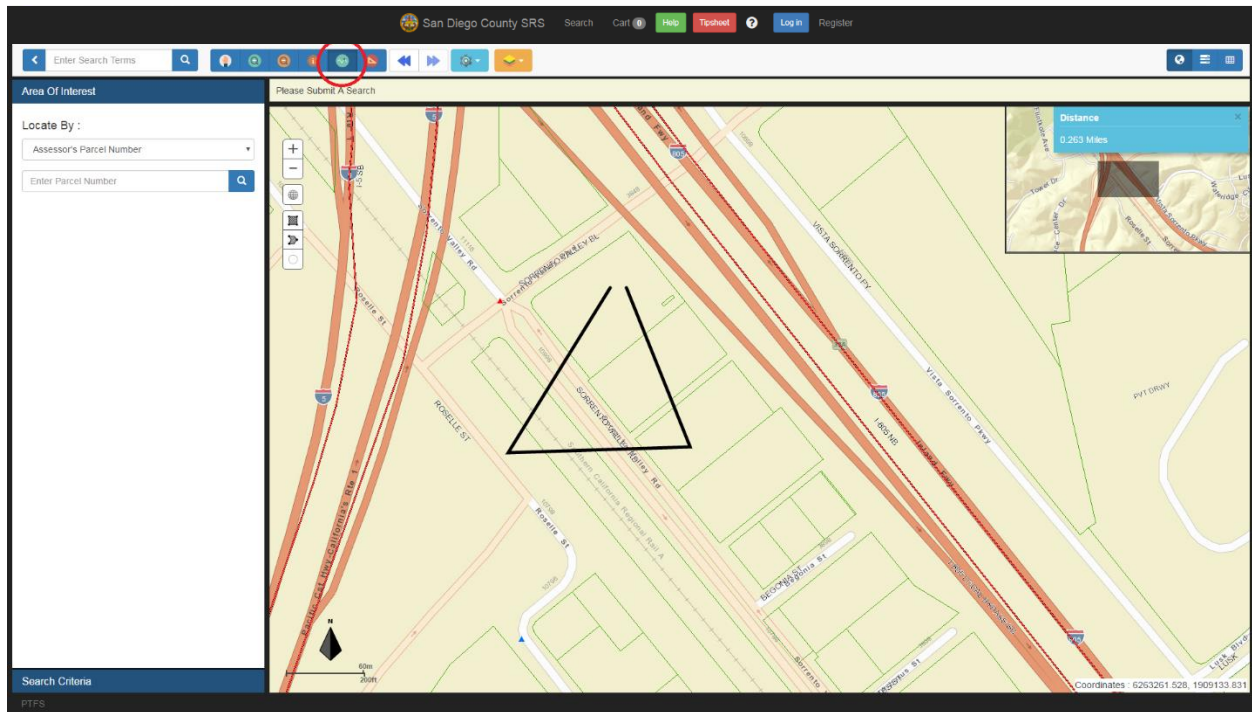

Figure 29: Use the distance tool to measure a created path on the map. The distance returned can be configured to use a desired length unit from the "Settings" button.

Use the "Area" button to create a polygon and measure the area on the map. A single click creates a new polygon side and a double click closes the polygon. The area returned will vary based on the Areal Unit chosen in the "Settings" panel. Figure 30 provides an example of the area tool in action.
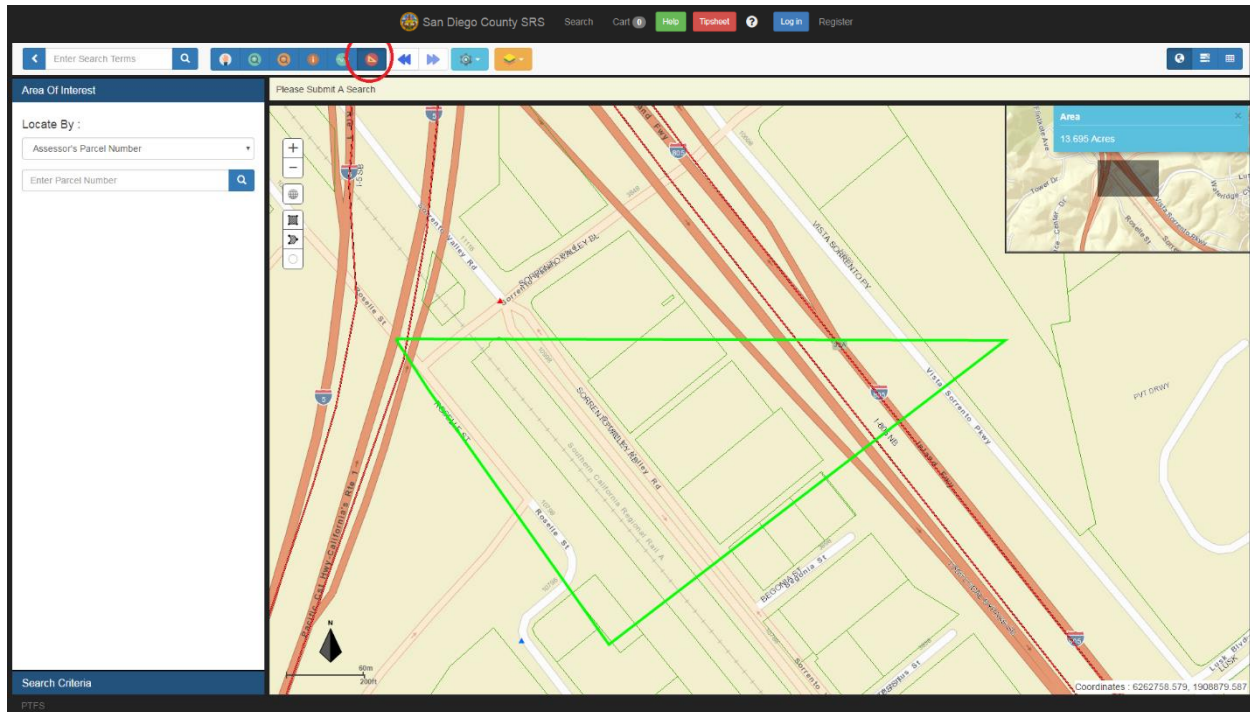

Figure 30: Use the area tool to measure an area on the map. The area returned can be configured to use a desired areal unit from the "Settings" button.

3.4.4.4 Extent History

Anytime the map is moved to a new extent, such as performing a locate, the extent history is updated. Users can traverse through their extent history using the "Extent History" buttons highlighted in Figure 31. Click the "Previous" button to go back to a previous extent, and "Next" to go the next extent.
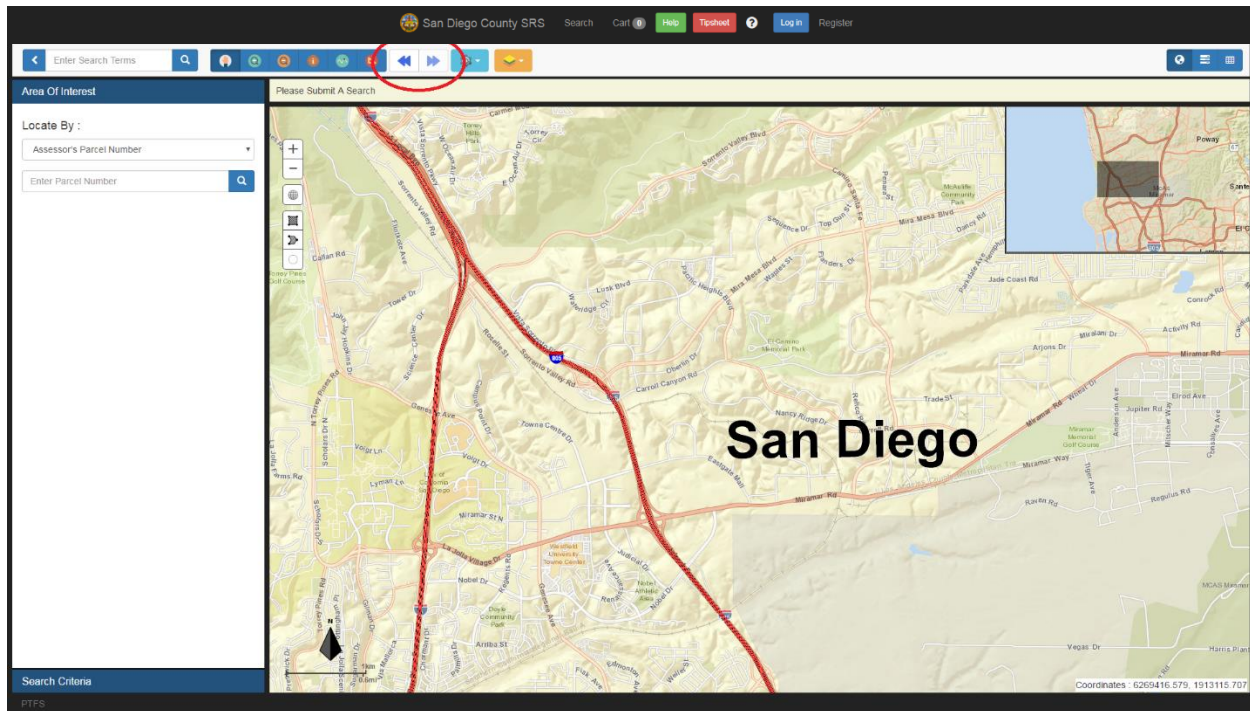

Figure 31: The Extent History control buttons. Click the "Previous" button to go back to a previous extent, and "Next" to go the next extent.

3.4.4.5   Layers

SRS' Map View is highly configurable. Users can toggle which map layers they would like to see on the map.
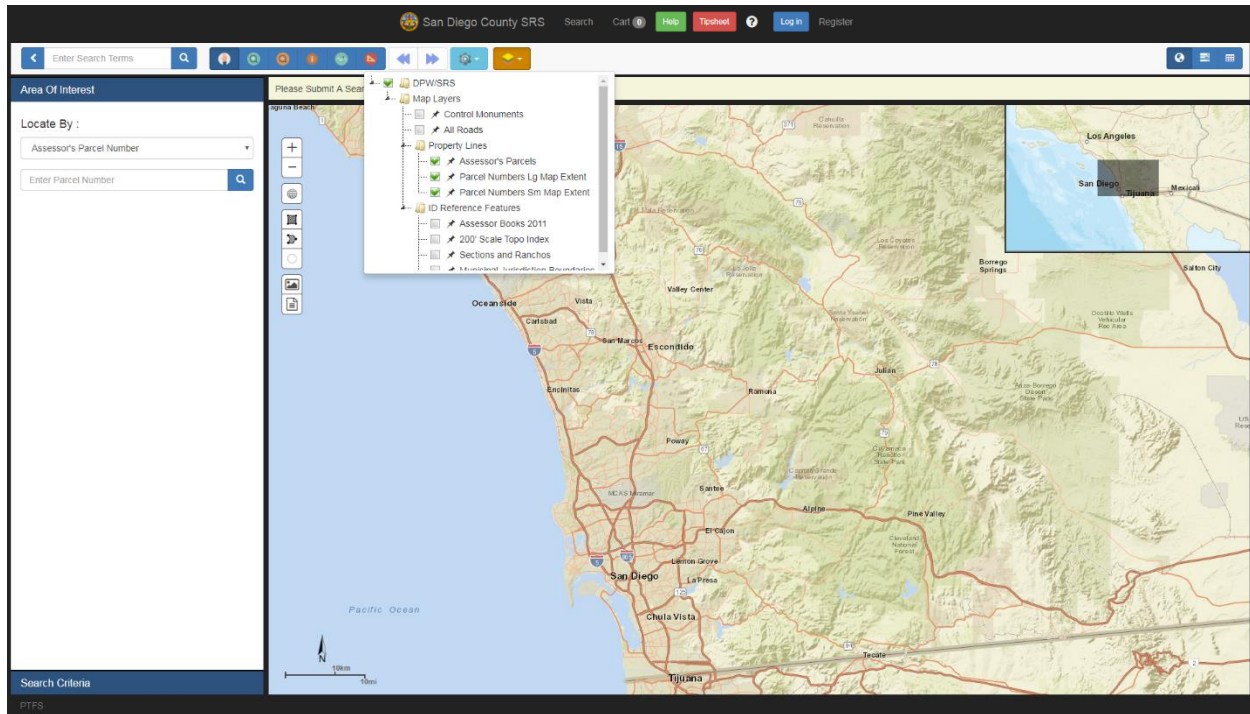

Figure 32: The "Layers" panel where users can enable and disable the layers to be displayed on the map.

3.4.4.6   Settings

The settings panel contains additional settings for the map. The "Overview" toggle controls a small overview on the right side. "Map Tips" toggles the map tips (hover text) that appear when a user hovers over a specific layer. This is only applies to a few layers and only if the layer is within the current zoom scale. The "Detach Results Automatically" toggle, if turned on, will open the previous results in a window anytime a new search performed. This is useful for users who want to compare results between searches. This feature is turned off by default. The "Basemap Layer" selector lets users choose which base layer to display with options including Streets, Satellite and more. Users can set the unit for length and areal, as well as the type of projection.
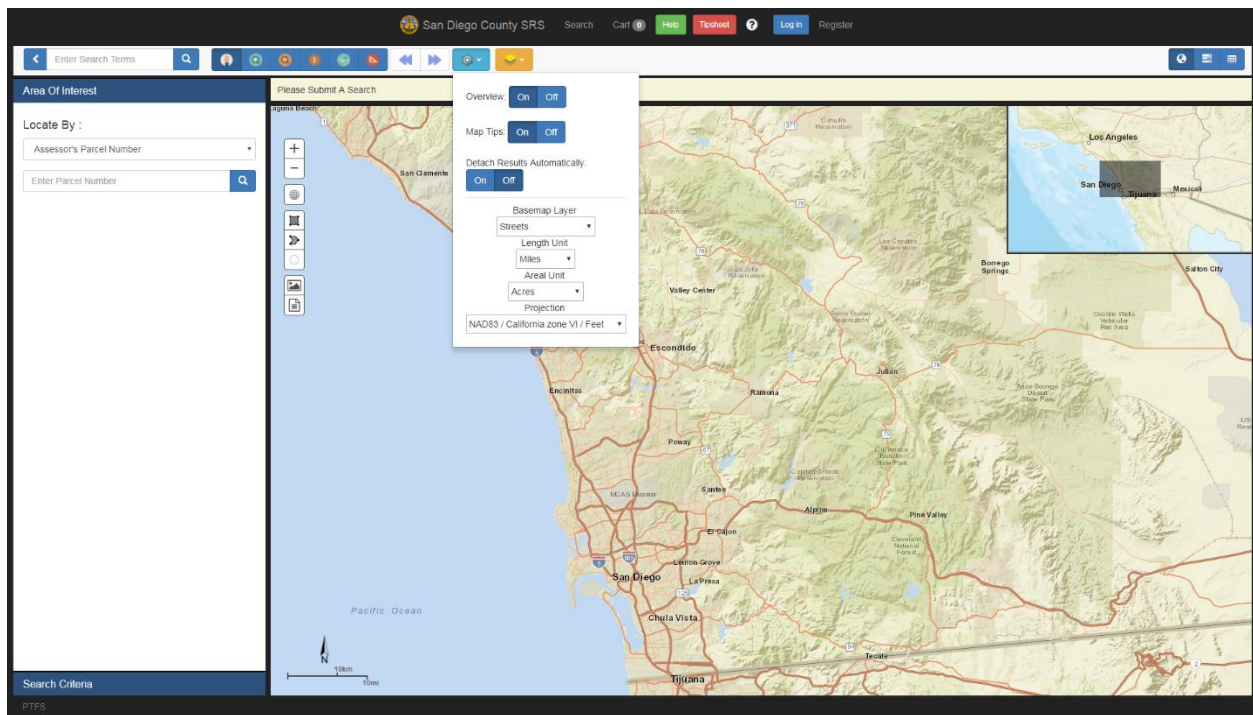

Figure 33: The "Settings" panel where users can toggle options on and off, as well as set values for the base layer, unit of length, unit of area, and projection.
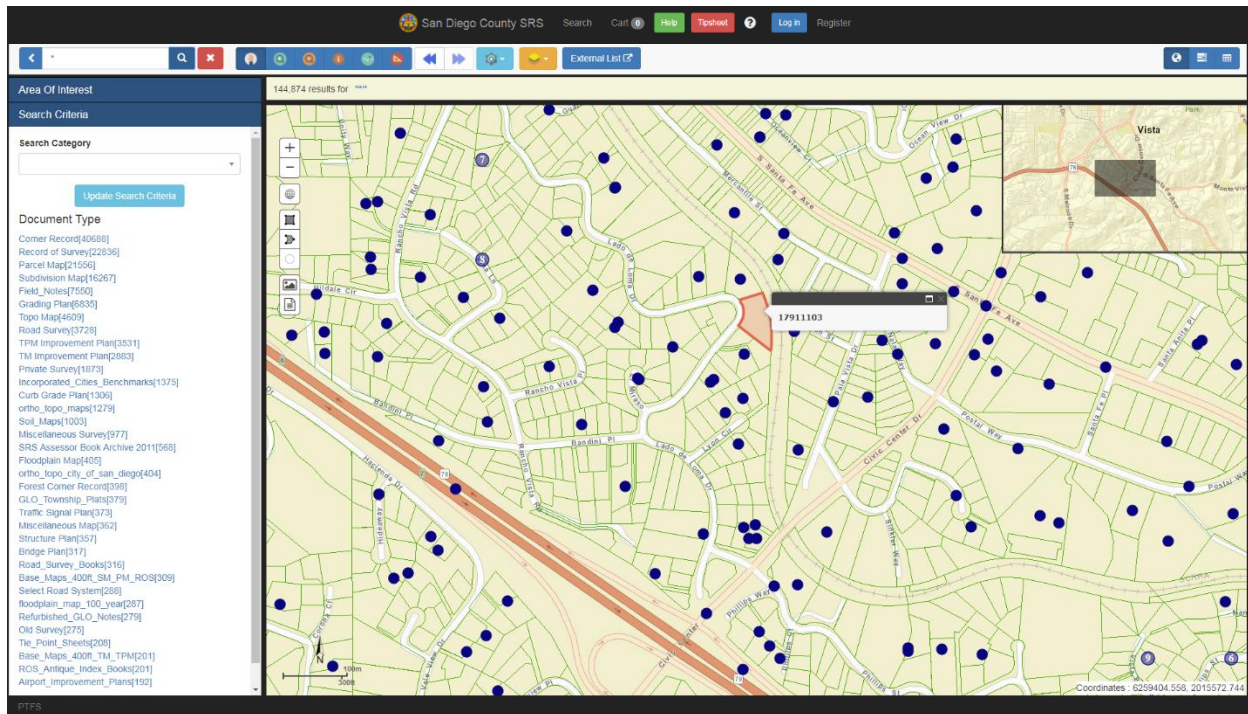
Figure 34: The hover text for a particular parcel layer feature.

4   Viewing Search Results

SRS allows users to select or change the result view. By using the 3 buttons in the top right of the GUI, you can select Map [   ] , Thumbnail [   ] , or List [   ] view to change the display on the fly. Map view will display geo tagged results while the List and Thumbnail view provide simple and detailed results, respectively.
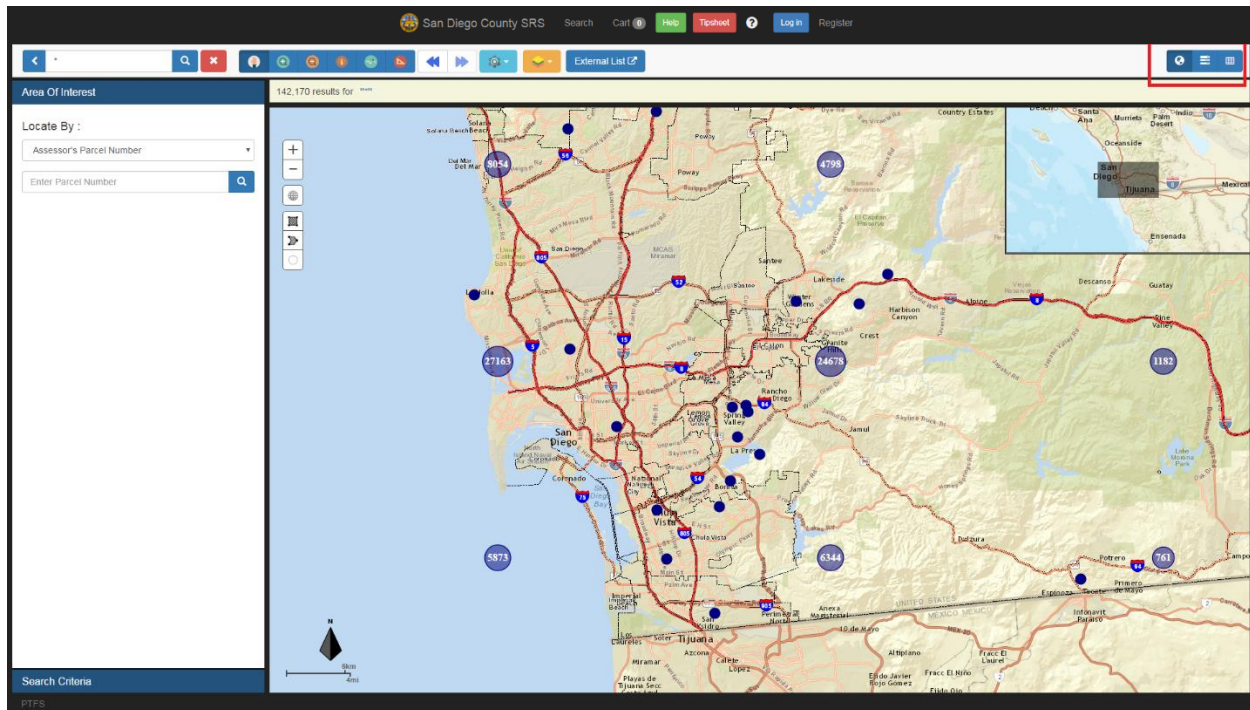

Figure 35: The view control indicated in this figure, allows the user to switch between the three views: Map, Thumbnail and List.

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4.1 View Results from the Map (Map View)

To view results in the Map View, click on the desired feature. A panel displaying the document name and available actions will appear. If the selected feature is a cluster, the panel will display all the records within the cluster. Figure 36 highlights a specific record in the cluster. Each record has a crosshair and magnifying button. The crosshair button will ping the record's location for a few seconds without zooming in. The magnifier performs a zoom on the record's extent. Clicking the record's name or thumbnail will open the document in the document viewer. See Discovered Content for more information on the document viewer.
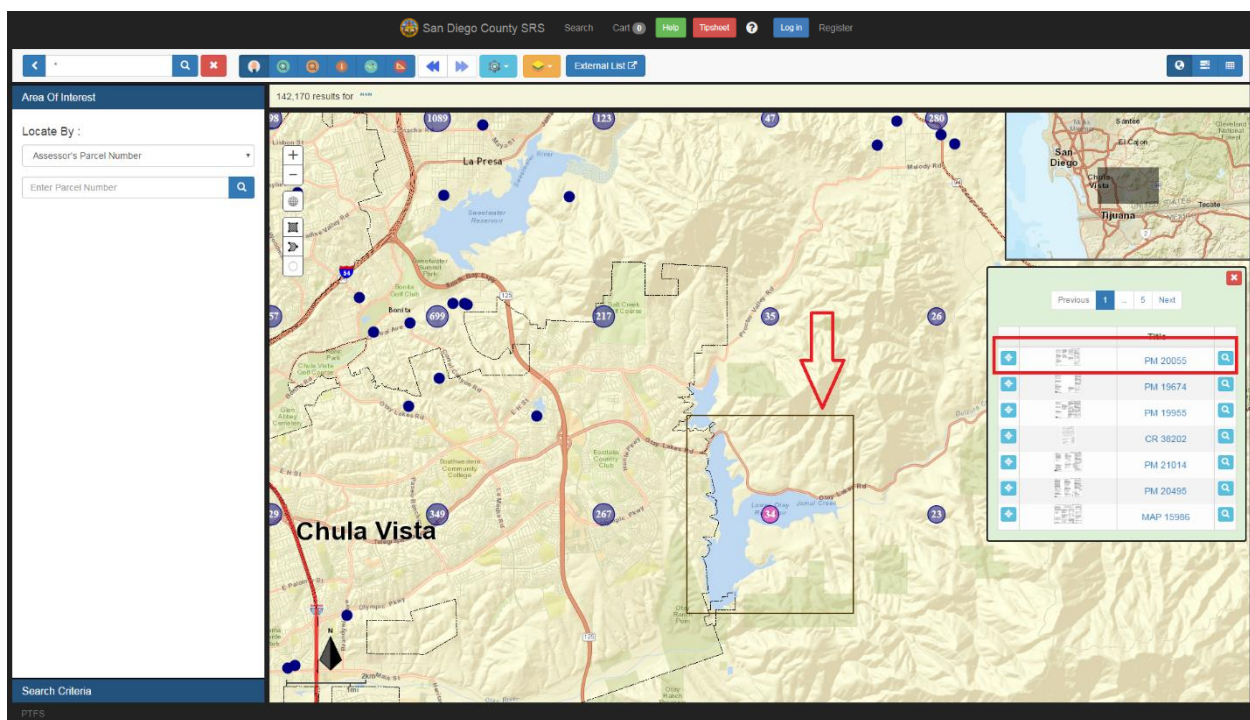

Figure 36: The number in this cluster indicates that there are 34 results contained within. Clicking the cluster displays a panel with the name and thumbnail of each result. Clicking on either of the two will open the record in the document viewer. The panel also contains crosshair and magnifying buttons which ping a record and zoom into the record, respectively.

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4.2 Viewing Results as list or grid (List View and Thumbnail View)

When viewing results in the Thumbnail or List View, you can see the result's metadata. List view provides a more compact table while Thumbnail View gives users a better view of the thumbnail overview along with metadata. By clicking on the thumbnail or title of a result, you will open the record in the document viewer. See Discovered Content for more information on the document viewer. Figure 37 highlights the "External List" button that will open the results list in another tab or window, depending on the current browser being used. Also highlighted, is the "Columns" button which allows a user to hide and show the desired columns in the grid. This setting is saved per browser session and is only cleared when the browser cache is cleared. This allows for the setting to be remembered even if you log off, so long as the browse cache is not cleared.

Figure 37: Viewing the results in the List View displays extensive metadata for each result. Clicking on the thumbnail or title of a result will open the result in the document viewer.

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5   View Discovered Content

All documents can be viewed in a document viewer for further inspection. Perform a search, find the desired result and click the result's thumbnail or title to open the result in the document viewer. See Viewing Results for more information on the different ways to view results. For users on the kiosk machines, no watermarks are applied to the images. Non-kiosk public users will see watermarks.

5.1.1   The Document Viewer

The document viewer serves all of the pages in the record in one viewer. To navigate the pages, use the selector on the left hand side. A record with less than 10 pages will have the thumbnail slider while a record with more than 10 will display the pages in a dropdown selector.

Located within the viewer itself are utility buttons to zoom in, zoom out, drag the image, re-center the image and rotate the image. Additionally there's a view box button that allows users to see portions of the document without a watermark (if one exists). Users can click the magnifying glass button to enable this feature. Note: When this feature is enabled, the rotation buttons are disabled.
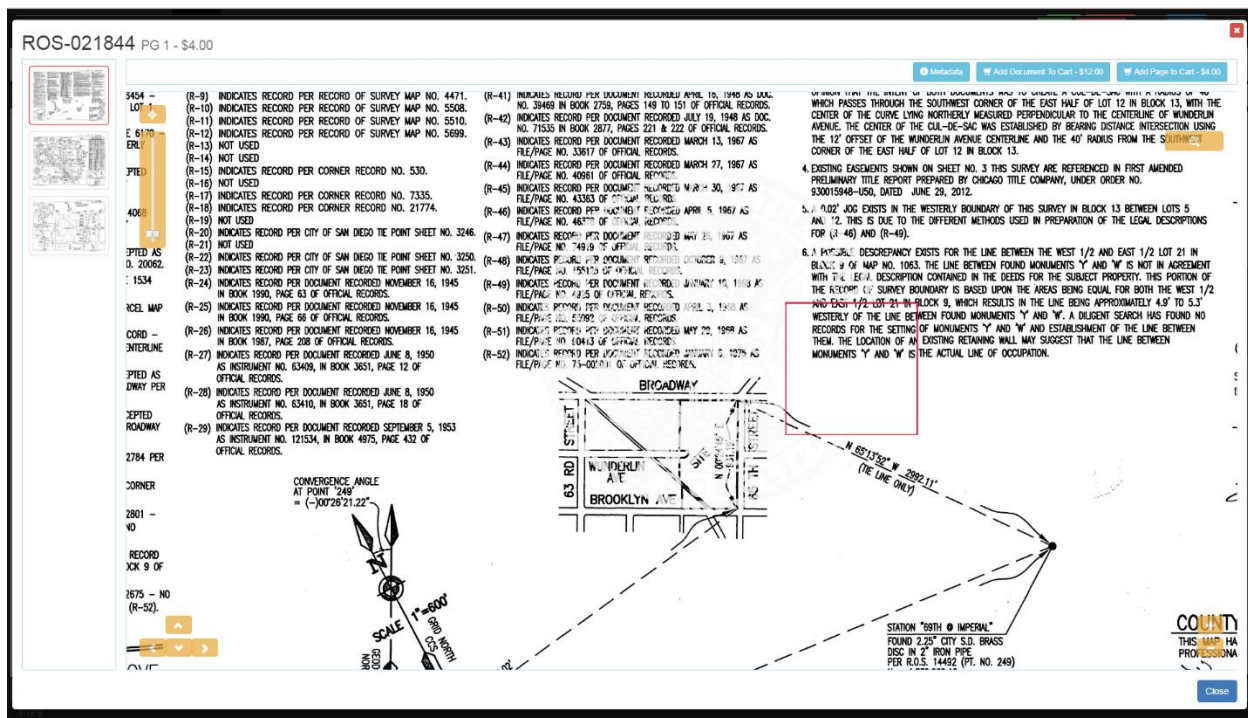

Figure 38: The view box enabled. Drag the red box to view portions of the document without a watermark.

On the right side are the page/record actions. Depending on the type of record or page selected, the actions available will vary. For example, in Figure 39 there is a "View Projected Image" button that only appears when the current page has a projection. Clicking the button will display the page's projection over the map layer as seen in Figure 40.
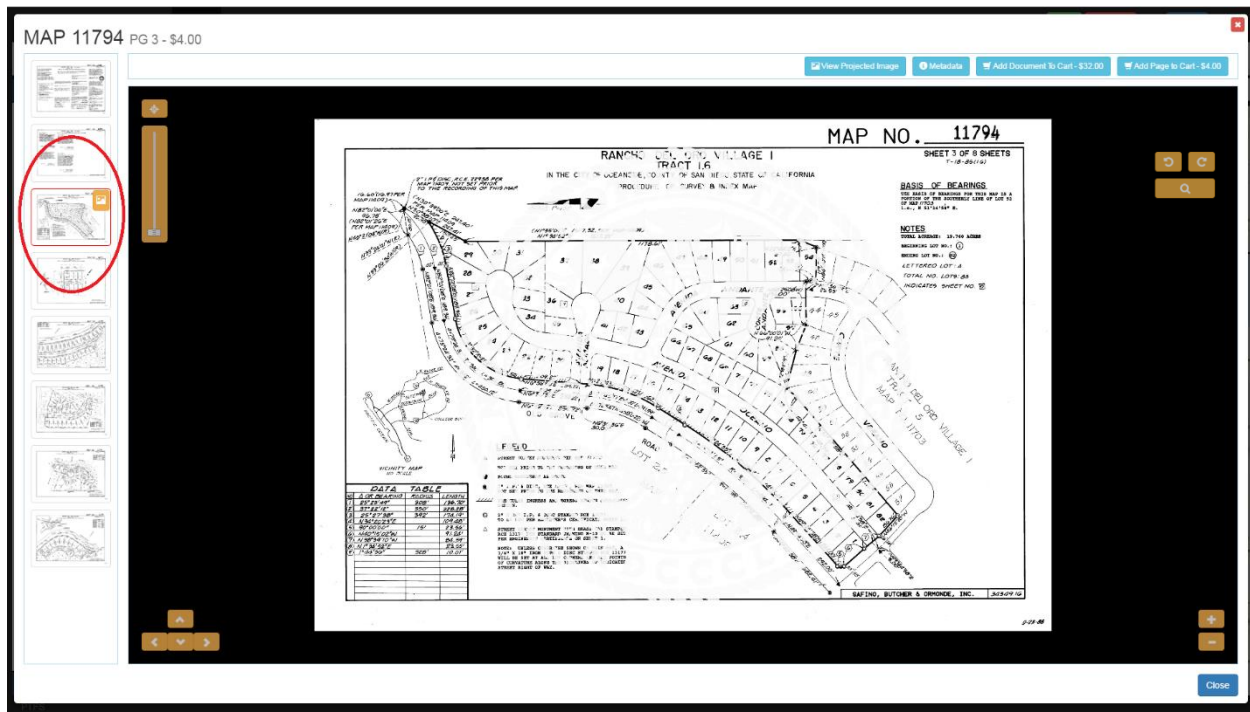

Figure 39: The Document viewer allows the user to view all pages in the document as well as perform document and page specific actions such as adding a single page to the cart, adding the whole document to the cart, viewing metadata, and viewing a page's projection over the map.
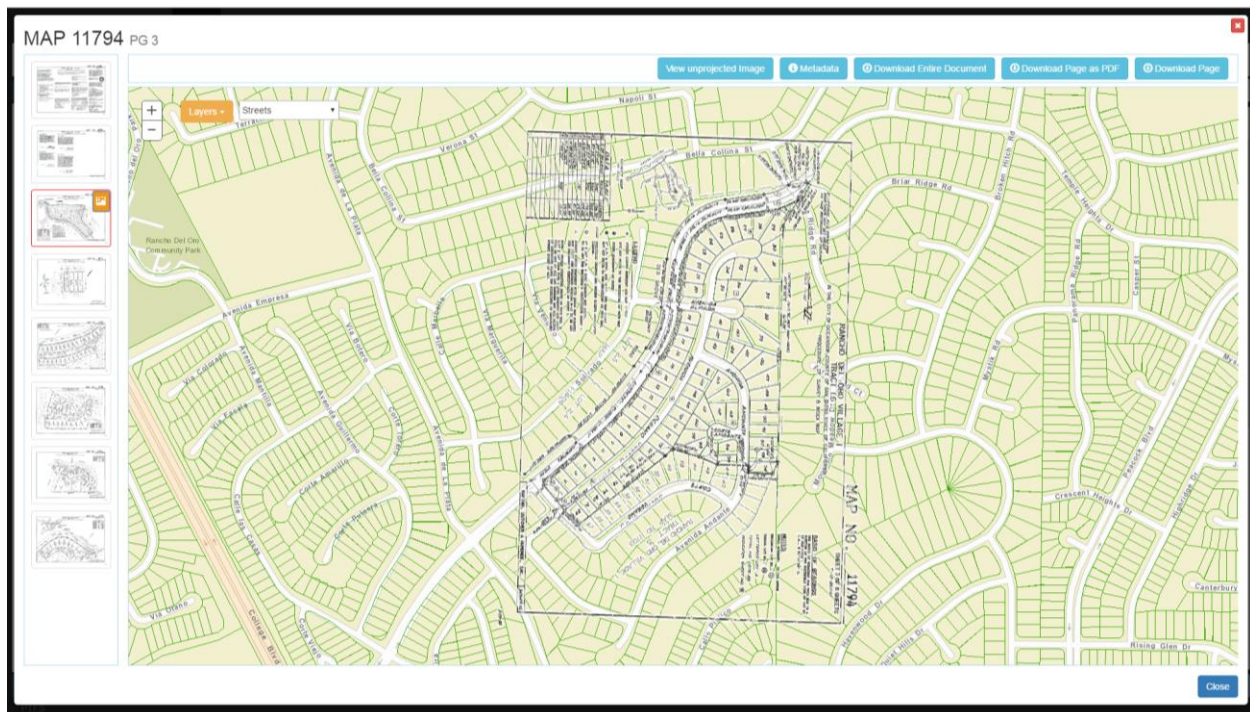
Figure 40: If a page has a projection, users can click the "View Projected Image" button located in the right hand side as seen in.

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Users can update their carts at any time by adding pages/documents to their cart. Hitting "Add Document to Cart" will add all the pages in the current document to the cart. The "Add Page to Cart" button adds only the current page.
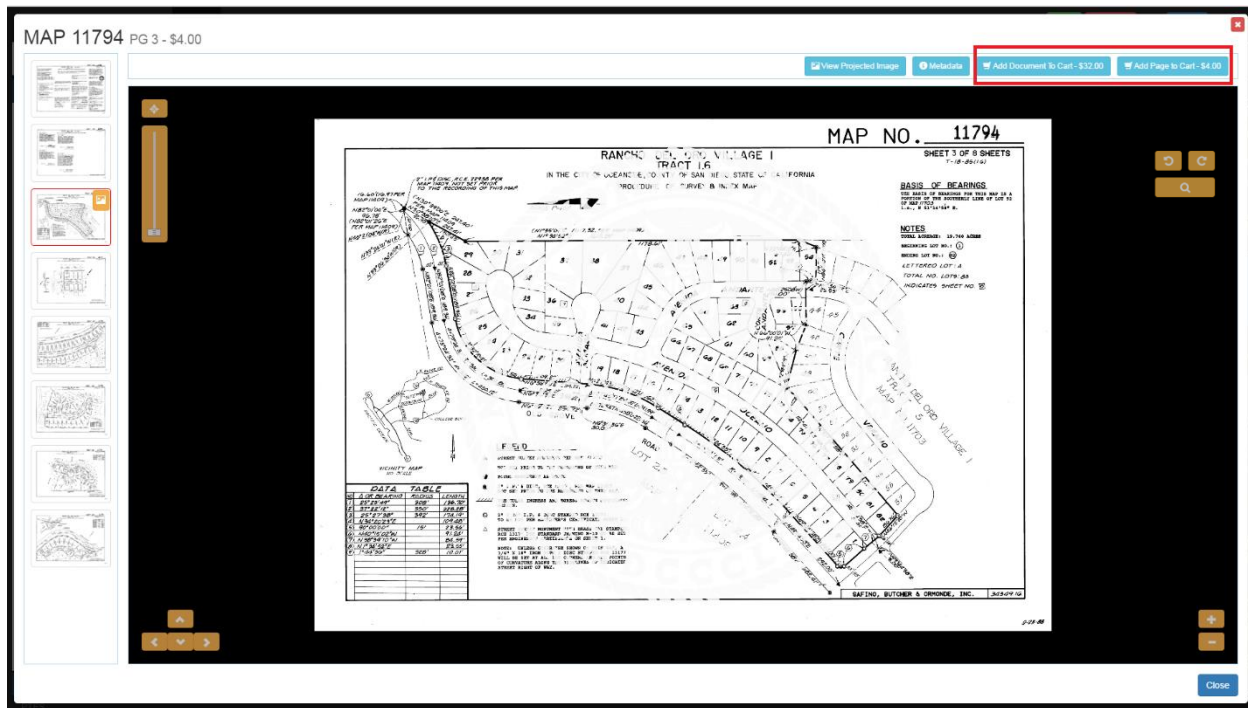
Figure 41: Indicated in this figure are buttons for adding to cart. Hitting "Add Document to Cart" will add all the pages in the current document to the cart. The "Add Page to Cart" button adds only the current page.

6 E-Commerce

6.1 Viewing the Cart

In addition to searching and viewing products, SRS allows users to purchase and download documents. Once you have performed a search and found the desired documents, add them to the cart. Once done, you can view the cart by pressing the "Cart" button in the navigation bar, as highlighted in Figure 42. Once in the cart view, you can clear your cart, clear specific pages, and review the order before proceeding with the checkout.
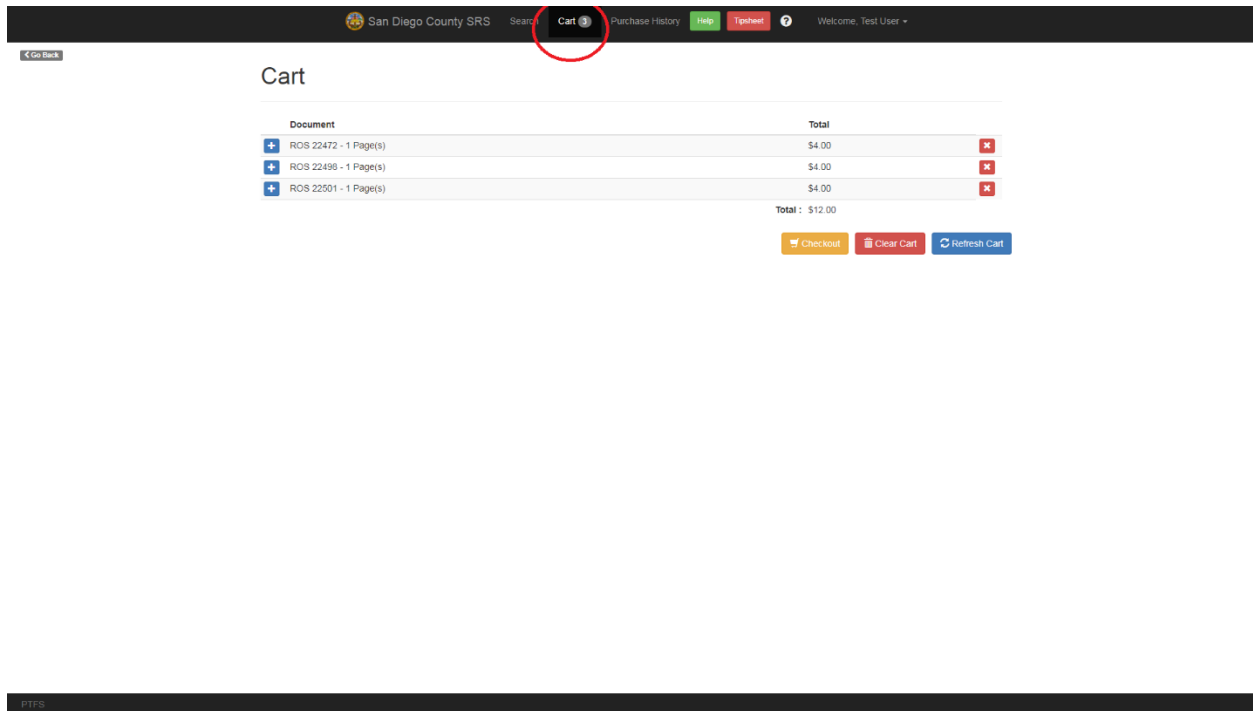
Figure 42: The current user's cart. The cart consists of 3 pages with a total bill of $12.00. Users can clear their carts with the red "Clear Cart" button or proceed with the checkout by clicking "Checkout".

6.2 Performing a Cart Checkout

6.2.1 Cart Checkout as a Public User

Once ready, press the "Checkout" button to proceed to the payment page. If logged in, you are automatically taken to the payment page. If not logged in, you will be asked if you want to register/log before checkout, otherwise you can just proceed as a guest. At the payment screen, choose the desired payment method and click pay.
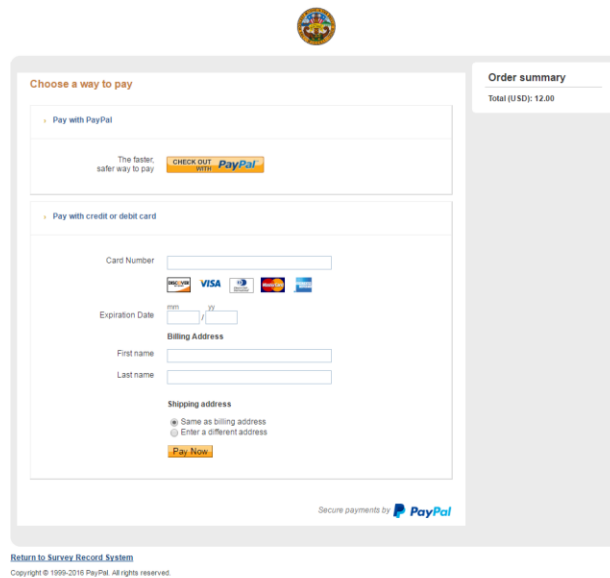
Figure 43: Once at the payment screen, choose a method to pay. Available methods may vary.

Once payment has been submitted, the user is returned to SRS to download their order. At the SRS download/confirmation page, users are able to see an order summary as well have download links for specific pages and the entire order. Each page can be downloaded as it's original format or a PDF format. The whole order can be downloaded as a ZIP with the button "Download Order". Once clicked, a dropdown menu will allow users to select between TIFF and PDF formats. When PDF format is chosen, if the order only contains pages from one document, then only one PDF will be downloaded. If the order contains pages from more than one document, a ZIP containing one PDF per document, will be downloaded. Clicking "Print Order Summary" will print the entire order summary as a receipt. Additionally, registered users can provide a custom note to their orders, for record keeping. This note can be seen in the Purchase History page.

Note: The PDF creation process can be slow depending on the size of the page as well as number of pages. This is generally only an issue when performing the "Download as PDF" process with large orders.
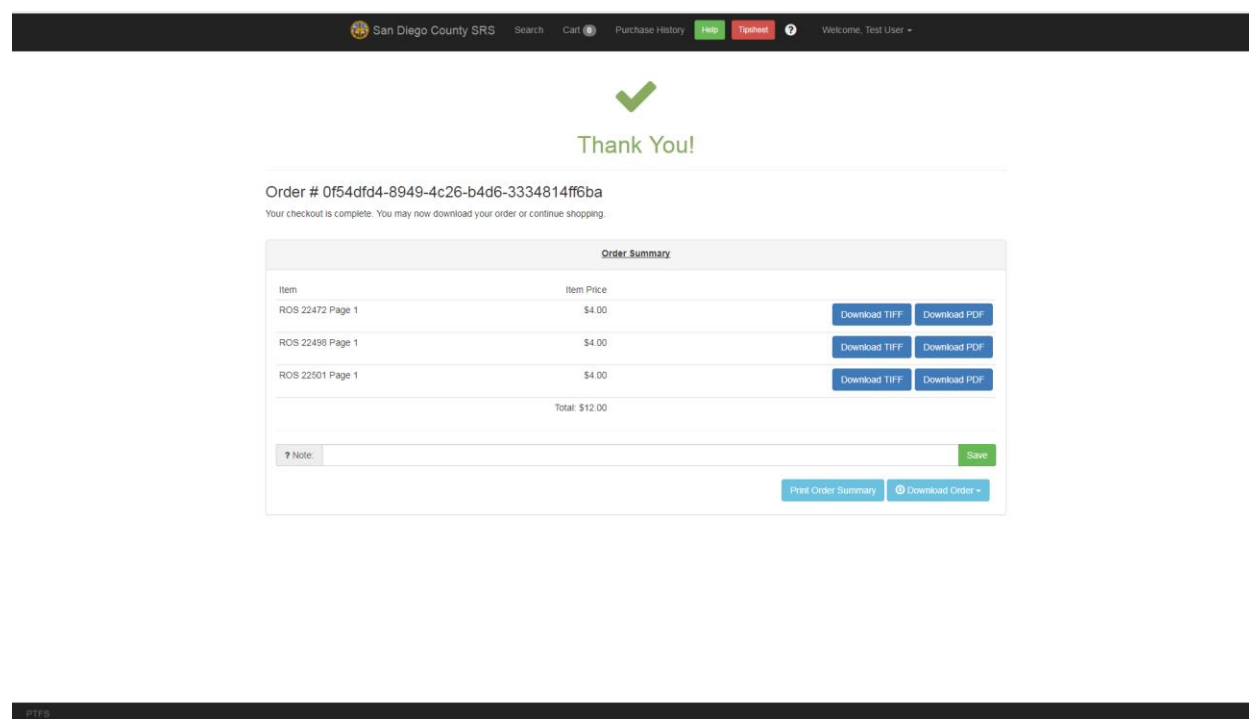
Figure 44: At the download page, users can download pages individually in their original format or as a PDF. Users can also download whole orders as a ZIP containing pages in original formats or PDFs. To print a copy of their order summary, click "Print Order Summary".

Figure 45: "Download Order PDFs" downloads the whole order in a PDF format. If only one document is present, the one PDF is downloaded, otherwise a ZIP of one PDF per document is downloaded.

Figure 46: A single page download of ROS 22472 page 1 in it's original format.

If the checkout is performed as a guest user, then the user is able to email themselves a download link. This link will only perform a ZIP download. A benefit of registering an account is that registered users can view previous purchases and perform the same operations they were able to in this download page.

Figure 47: A guest user checkout download page. The user can email themselves a download link. This link will only allow users to download orders as a ZIP.

6.2.2 Cart Checkout on a Kiosk

Purchases on a kiosk machine are similar with the one difference being that the user pays for the order, they are instructed to take their order information to the front desk so that their document(s) can be printed.
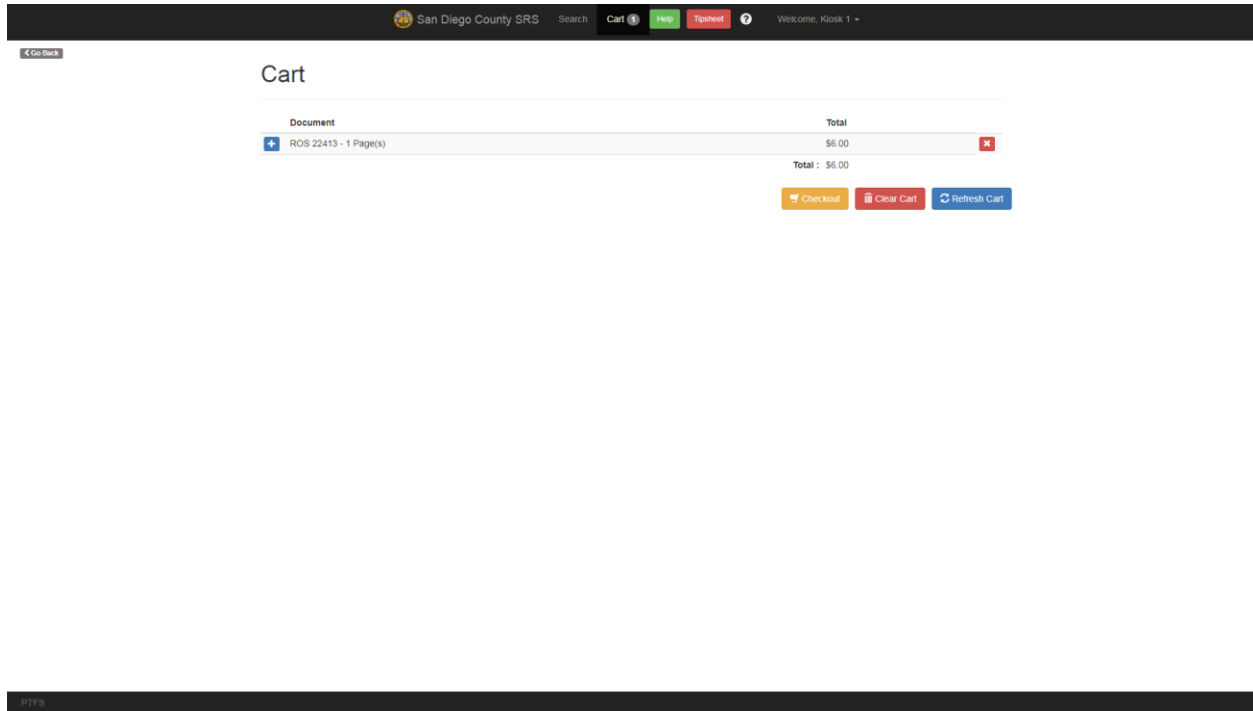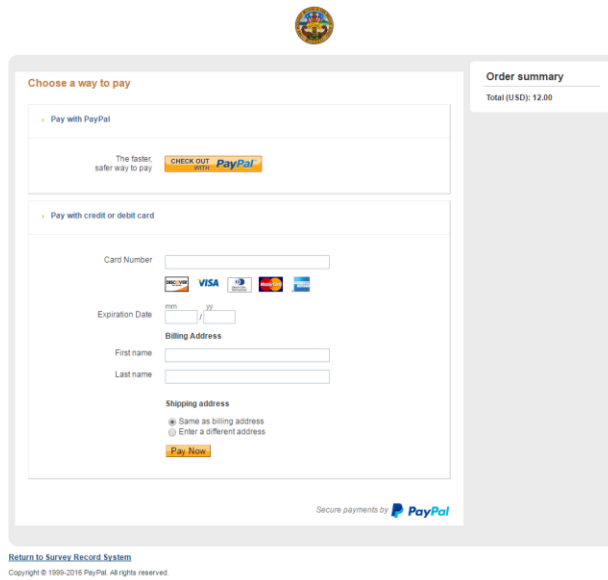
Figure 48: The cart for a user on a kiosk machine. Clicking "Checkout" will take the kiosk user to the PayPal payment page to continue the checkout process.

Figure 49: Once at the payment screen, choose a method to pay. Available methods may vary.

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Once the checkout process finishes, users are presented with information regarding their order. A user can then take this information to the staff desk to finalize the order.
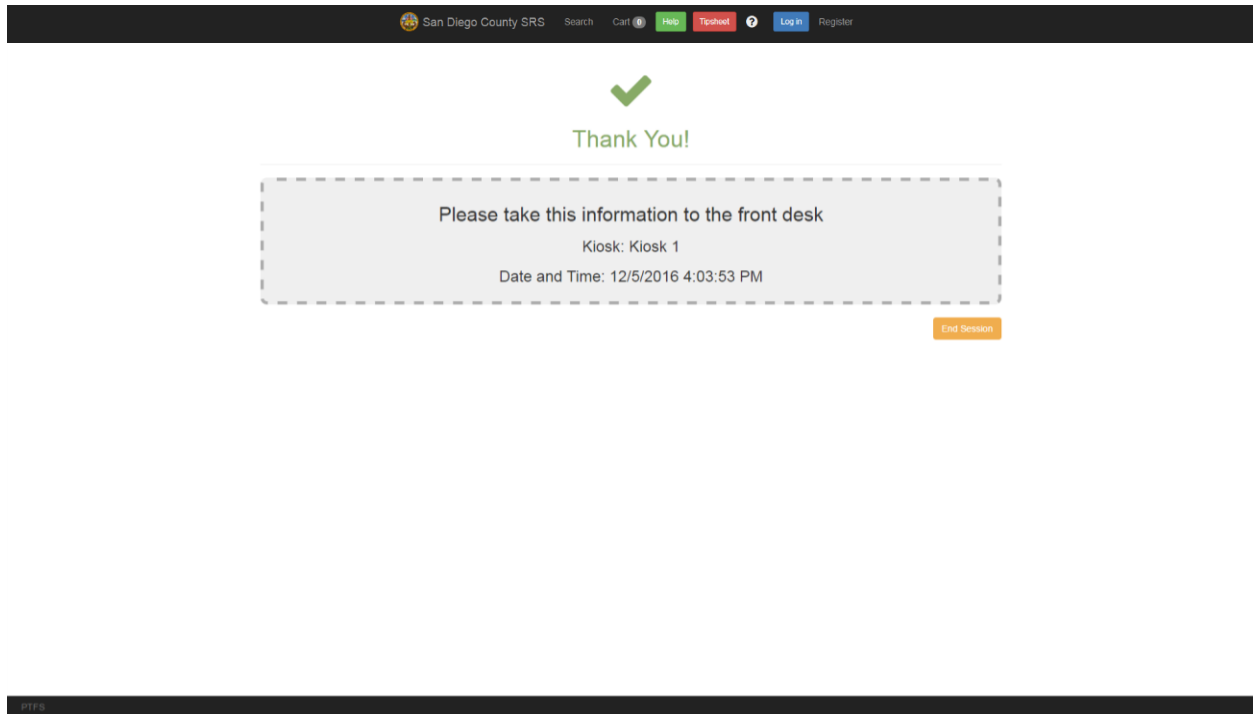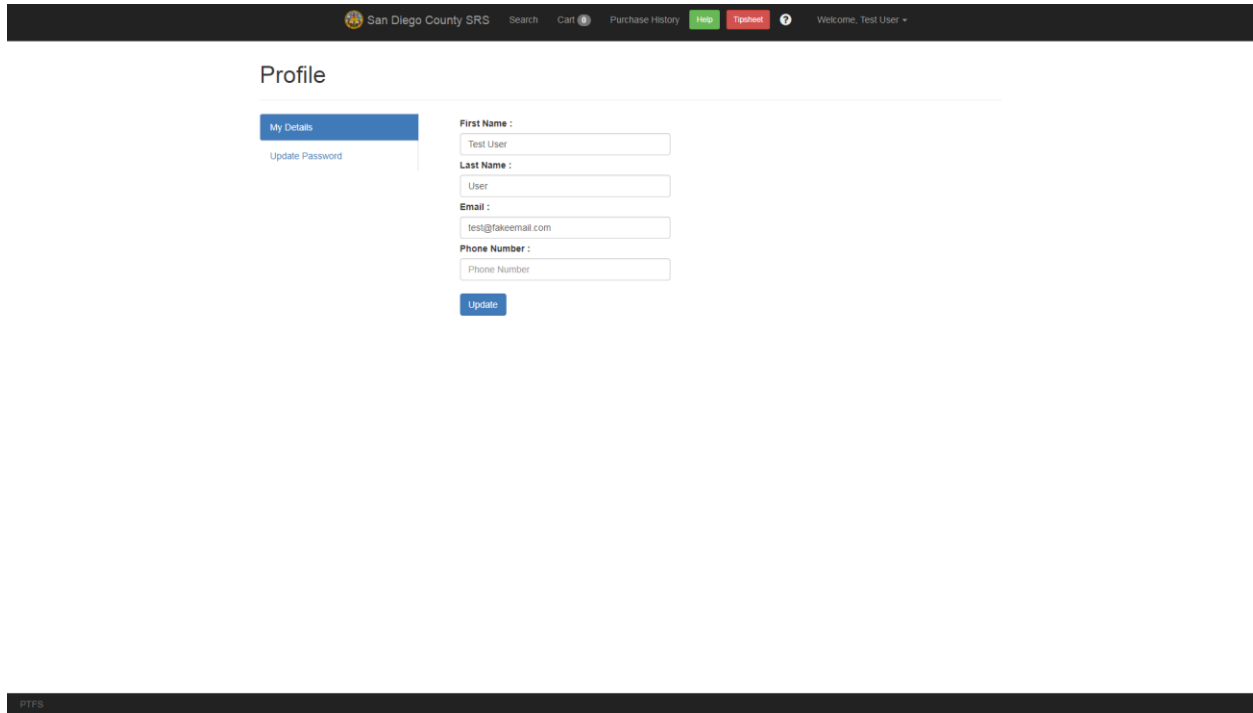

Figure 50: Once a checkout is complete, a user can take this information to a staff desk to have their order printed.

7 Miscellaneous

7.1 Profile

Clicking on a user's name, as shown in Figure 51, reveals a menu with a link to logout and a link to go to the profile page. Clicking "Profile" takes the user to the profile page where users can update their contact information and change password.
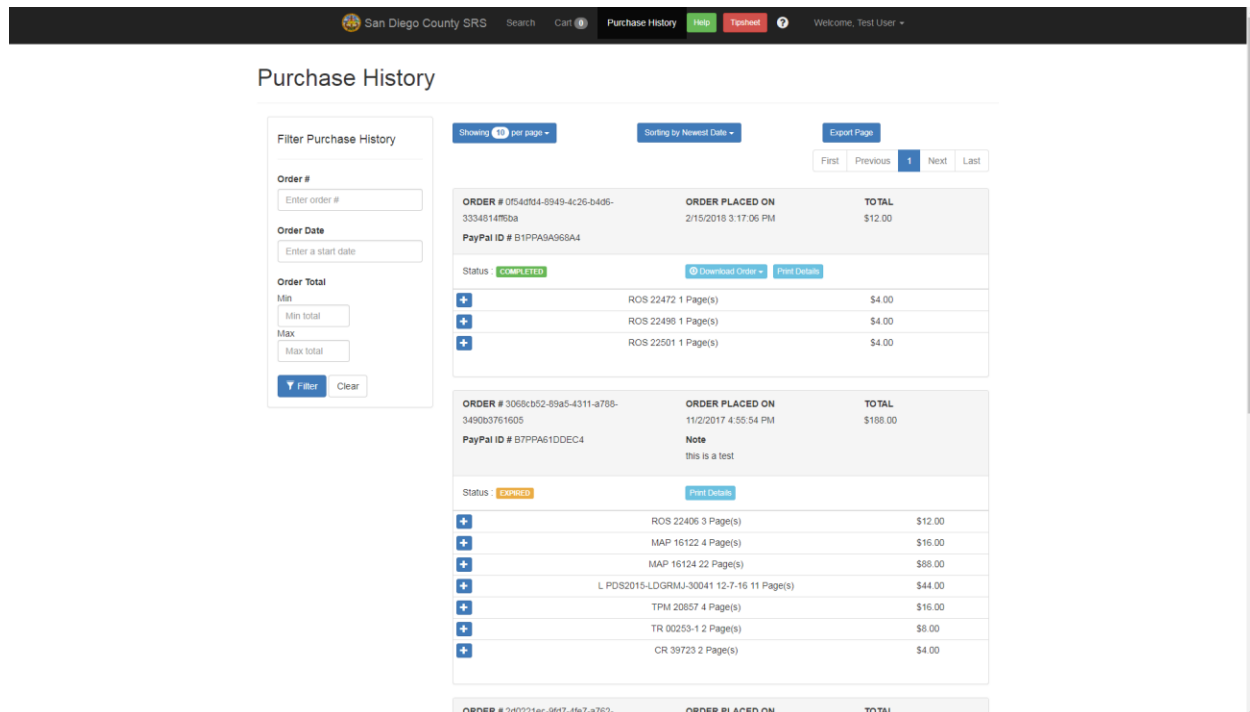

Figure 51: The profile page where a user can update contact information and change their password

7.2 Purchase History

Users who register an account have the ability to access their purchase history. Any checkouts performed will show up in this page. Users have the ability to query their purchase history by *order number*, *order date*, or a *price range*. Additionally, users can perform downloads (single and whole order), print an order summary, or print the order summaries of all the orders in the current result page. If the user provided a note for a specific purchase, it will show as highlighted in the screenshot below.

Figure 52: The purchase history page where users can query through their previous purchases.